AMERICAN RED CROSS

VOLUNTEER ADMINISTRATION MANUAL

Functions of Volunteer Administration

ARC 3317
Rev. 12/97

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INTRODUCTION AND PURPOSE

"The American Red Cross is a humanitarian organization, **led by volunteers**...."

The mission statement of the Red Cross highlights the importance of volunteers in the leadership of the organization as well as delivery of services. This manual will assist units in developing volunteer resources by defining the volunteer administration process, providing recommendations and requirements for steps in this process, and furnishing tools or forms for specific areas of the process.

The process of volunteer administration can be divided into 18 key functions:

1. Making a commitment to volunteer resources
2. Assessing the need for volunteer involvement
3. Developing financial support for volunteer resources
4. Formulating volunteer policies and procedures
5. Designing meaningful volunteer jobs
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7. Marketing volunteer jobs and volunteering
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Terminology

Unit refers to a Red Cross operational entity that is assigned the highest level of responsibility for Red Cross service within a particular geographic and/or service area. Examples of Red Cross units include chapters, military stations, Blood Services regions, regional offices, and national headquarters.

Volunteer administration refers to the systems and processes related to recruiting, receiving, effectively involving, and retaining a qualified volunteer workforce and leaders. Volunteer administration is also called volunteer management.

Volunteer administrator refers to individuals who are assigned the primary responsibility for the volunteer administration functions within a unit. In some units, this responsibility is combined with another position or additional responsibilities. Examples of common titles for a volunteer administrator are—

- Director of volunteers, director of volunteer resources, director of volunteer personnel, director of volunteer administration, or director of human resources.
- Chapter manager, chapter executive, or station manager.
- Chair of volunteers, or station chair.
- Coordinator of volunteer administration, or coordinator of volunteers.

The Red Cross volunteer administrator provides the structure and leadership for accomplishing the Red Cross mission through the involvement of volunteers.

SECTION ONE:
MAKING A COMMITMENT TO VOLUNTEER RESOURCES

Each unit should regularly review its effectiveness in responding to the mission of the Red Cross. This review would evaluate unit policies, finances, staffing, and administrative operations, including the unit's commitment to volunteer resources as a critical component in delivery of the Red Cross mission. During this review, paid and volunteer leadership should recommit to—

- Fully and effectively involving volunteers in fulfilling the mission of the Red Cross.
- Nurturing the partnership of paid and volunteer staff working together to achieve the goals of the Red Cross.
- Ensuring adequate support to strengthen the volunteer resource development process.

This commitment to volunteerism in the Red Cross should be formally reflected in the unit's mission statement, goals, and objectives. The Red Cross made a commitment to the 10 principles of volunteerism as part of the *Volunteer 2000* study.

How is Your Unit Doing?

Use the following questions to measure the effectiveness of your unit's commitment to volunteerism. The more positive answers you have, the better you are doing.

☐ Yes ☐ No Have we identified and removed barriers to volunteering?

☐ Yes ☐ No Do we adequately budget for the support and management of our volunteer resources?

☐ Yes ☐ No Do we recognize that our volunteers give more to the Red Cross than the savings in labor costs?

☐ Yes ☐ No Do we treat our volunteers as professionals rather than amateurs? Do we provide adequate training for our volunteers to be skilled and knowledgeable about their jobs?

☐ Yes ☐ No Do we consider volunteers' expectations from their volunteer experience?

☐ Yes ☐ No Do we offer the same type of work to paid and volunteer staff? Do we treat paid staff and volunteer staff the same?

☐ Yes ☐ No Are volunteers placed in management roles?

☐ Yes ☐ No Is our volunteer recruitment targeted? Are we careful to match the jobs with the volunteers?

☐ Yes ☐ No Have we been advocates for our volunteer resources?

☐ Yes ☐ No Have we built collaborative relationships with other nonprofit organizations? With other Red Cross units? With other departments in our own unit?

SECTION TWO:
ASSESSING THE NEED FOR VOLUNTEER INVOLVEMENT

Conducting an annual formal needs assessment of volunteer involvement should engage the entire Red Cross unit. This process will provide information to establish viable goals and objectives concerning volunteerism for the volunteer administrator as well as the entire unit.

Although statistical information about the current workforce is helpful, needs assessments that only give numbers are not complete. The number of registered and unregistered volunteers, the number of hours worked by volunteers, and the number of new volunteers recruited and placed in the last year provides only partial information on the strengths or weaknesses of the workforce. Appendix 2.1 lists important information you may want to "capture" in your needs assessment.

Eight-Step Plan for Conducting a Needs Assessment

Coordinating the needs assessment process is the responsibility of the volunteer administrator, and provides an ideal opportunity for him or her to function as an internal consultant. In developing a strategy to assess your unit's needs, the following eight steps are recommended:

Step 1: Identify the purpose of the needs assessment and the areas to be assessed.

Reconsider each year what needs to be assessed. Some areas will be assessed each year. However, some questions will not need to be asked again and new questions will need to be added.

To guide you through this step, ask—

- What do you want to know when you have completed the assessment?
- Who have you involved from unit leadership and community resources in determining what should be assessed and how the assessment results will be used?
- What information did you need but could not obtain in the past year?

Step 2: Schedule the needs assessment as part of the unit's planning cycle.

The needs assessment should be part of the unit's planning cycle. Work with the unit's planning leadership to determine the most appropriate time of the year to conduct the assessment, so that it will be available for establishing goals and objectives as well as budgeting.

Step 3: Develop a project plan for conducting the assessment.

Developing a plan for the assessment clarifies the responsibilities of all persons involved and provides a method to track progress of the assessment. Use the following questions to guide your plan:

- Have you identified the action steps for conducting the assessment?
- What resources will you need (time, material, financial, personnel)?
- Are these resources now available? If not, how can you get them?
- What are the benchmarks for progress and success?
- Are roles for staff involved in the assessment clearly defined?
- Who is the project manager?
- Has a realistic time line been established?

Step 4: Construct the assessment tool.

Developing a formal assessment tool provides consistency and efficiency in gathering information. Each unit should develop its own assessment tool using questions that reflect its initiatives, community, and services. Ask for support from your board's planning committee or a consultant from your community.

- Do the words used in the assessment, for example, "staff," "standards," and "volunteers" mean the same thing to all who will participate in the assessment?
- Have you defined the meaning of abstract words such as "successful," or "quality" in your unit?
- Can the assessment be completed within a reasonable time frame?

Step 5: Identify and train those who will be involved in conducting the assessment. Meet with key staff to walk through the process and to identify how the data can best be collected within the unit's subgroups (departments, services, and branches).

Here are some questions to guide your planning of this step:

- Did you recognize barriers that suggest you need to change the tool or the process?
- Did you have the full support of each key staff member?
- What can you do to get that support before conducting the assessment?

Step 6: Kick off the assessment in a formal way.

By beginning the assessment formally, you not only remind people of the time lines, but also emphasize the significance of the assessment. Involve board members and management leaders in the kickoff.

Step 7: Conduct the assessment.

The assessment should be conducted within a specified time frame. Recruitment of a special group of leadership volunteers to conduct the assessment is highly recommended. The following questions need to be answered while conducting the assessment:

- Are deadlines being met? Are they followed up on when not met?
- Are all staff involved in conducting the assessment properly supported with materials?
- Is the project manager or volunteer administrator readily available during the time the assessment is being conducted?
- Is progress being monitored?

Step 8. Report the findings.

When the assessment is complete, the data should be collected and analyzed. A written report as well as oral reports should be prepared for key stakeholders, especially unit management, the board of directors and advisory committee members.

The written report should be organized to reflect the purposes of the needs assessment identified in Step 1. The findings and recommendations should be reported in the context of organizational planning. The report should also provide information for each department participating in the needs assessment as well as a unit summary.

Clarifying Expectations and Assigning Responsibility

After the needs are identified, the volunteer administrator is directly responsible for striving to incorporate the findings into the unit's overall volunteer management process. The administrator together with the unit leadership should review the results and assign responsibilities for carrying out any recommendations found in the assessment.

Volunteer administration leaders should also meet with each department or unit to share the report and interpret the findings for that department. This will assist key staff in planning for the department's involvement and management of volunteers.

How is Your Unit Doing?

Use the following questions to measure the effectiveness of your unit's needs assessment process. The more positive answers you have, the better you are doing.

□ Yes □ No Have all services, programs, and levels of leadership responded to and supported the needs assessment?

□ Yes □ No Has the assessment gathered the data and information that is needed for planning and budgeting?

□ Yes □ No Are needs assessment results frequently cited in planning and budgeting meetings?

☐ Yes ☐ No Does each department include objectives for volunteer involvement and management as suggested by its needs assessment?

☐ Yes ☐ No Is funding priority given to recommendations from the needs assessment?

ASSESSING NEEDS TO PROVIDE BROAD MANAGEMENT INFORMATION

The needs assessment usually captures basic information, but may also focus on a specific area, depending on the unit's needs and strategic plan. The annual assessment may include the following information:

- Organizational and program needs for volunteer staffing
  - — By program or department
  - — By requirements or skills
  - — By time availability or shift
  - — By site or location

- Organizational and program capability for supporting additional volunteer staffing
  - — Training requirements
  - — Coaching or supervision provided
  - — Appropriate, adequate policies and procedures
  - — Space requirements
  - — Additional resources, uniforms, supplies, and equipment available

- Needs of current volunteer workforce
  - — Additional training
  - — Opportunities for development
  - — Additional resources

- Organizational and program barriers to recruiting and/or placing volunteers
  - — Lack of space or equipment
  - — Lack of flexible opportunities or time constraints
  - — Language and cultural differences
  - — Lack of attractive jobs
  - — Inability to provide adequate supervision
  - — Unit structure or culture that impedes full volunteer involvement

- Organizational initiatives to increase or reach select populations (diverse cultures, young adults, youth, seniors, disabled, or other specific initiatives)
  - — Current levels of participation by targeted populations
  - — Integration of targeted populations into existing volunteer workforce
  - — Removal or modification of barriers that impede involvement by targeted populations
  - — Assurance of adequate resources to support the initiatives

SECTION THREE: DEVELOPING FINANCIAL SUPPORT FOR VOLUNTEER RESOURCES

"An organization must recognize and willingly bear the costs [of working with volunteers] if it is to maintain a strong, well-qualified workforce . . . recognizing the costs of volunteer involvement is the first step in developing a budget which supports volunteers." *Volunteer 2000*

Costs of Volunteer Resources

- Administrative costs (insurance, postage, printing, space, supplies, paid staff salary and benefits, equipment, telephone, etc.)
- Recruitment and marketing (posters, flyers, displays)
- Intake costs (screening and background checks)
- Identification costs (name badges, uniforms)
- Volunteer training and development (materials, travel, registration)
- Recognition for volunteer efforts (formal and informal)
- Supporting funds (reimbursement for gasoline or child care)

Volunteer involvement costs should be included in the unit's organizational budget, just as the costs of paid staff are included. See Attachment 3.1 for a guide to budgeting for volunteer involvement.

Calculating the Dollar Value

During the budget process, it may be important to demonstrate the value that volunteers bring to the organization. One method of doing this is to estimate the financial value of volunteer time donated to the unit annually. Use this formula to make a dollar estimate:

Dollar Value of Volunteer Time	**Number of hours*** given by volunteers in the unit during a calendar year.	✖	**$ Average Hourly Wage** average hourly value of volunteer time (including benefits) from the current year's *Economic Report of the President.*

* If you do not record hours in your unit, use a reasonable hypothetical average such as four hours per week, which, according to the Independent Sector, is the 1996 national average hours per week given by all volunteers.

Ways to Fund Volunteer Programs

Sources of funding for volunteer programs include—

- Unit operational budgets. Funding for volunteer management should always be included in Red Cross operational budgets.
- Special initiative and development grants from the national organization. The types of grants available each year may vary.
- Collaborations with local organizations and institutions for grant and initiative funding. Build relationships with universities, the United Way, the Volunteer Center, and other civic, educational, and social organizations. Be flexible in getting your financial needs met through collaborative funding or by piggybacking your initiatives onto those of another organization.
- Government and foundation grants. Be aware of the funding priorities of foundations, and apply when there is a match with Red Cross programs and services. Local, state, and national government agencies may also provide revenue through contracting.
- In-kind contributions. Never overlook the possibility for contributed goods and services instead of money. Printing, name badges, catering, use of facilities, and graphic design are among the many excellent in-kind gifts.

Keep in mind that grants and in-kind contributions are time-limited and may require special reporting or reapplication for continued funding. Document your unit's intention to budget for ongoing financial needs that may be temporarily met through a grant.

Volunteer administrators should have a basic knowledge of financial development and grant proposal writing, and should develop a strong, cooperative relationship with financial development staff members and continually apprise them of funding needs. In units without a financial development department, the volunteer administrator should have professional-level skills in proposal writing or should recruit volunteer grant proposal writers.

How is Your Unit Doing?

Use the following questions to measure the effectiveness of your unit's financial support for volunteers. The more positive answers you have, the better you are doing.

☐ Yes ☐ No Has each service budgeted for the costs of supporting volunteer staff?
☐ Yes ☐ No Has each service calculated the "value" of volunteer resources?
☐ Yes ☐ No Does the unit seek start-up funding for new programs for volunteers?

Attachment 3.1

BUDGETING FOR VOLUNTEER INVOLVEMENT

Has your unit budgeted for—

Yes	No	
		Implementation of needs assessment findings?
		Administrative support for volunteer positions (e.g., travel, work space, equipment, clerical support, postage, long-distance telephone calls, and photocopies)?
		Recruitment campaign costs (e.g., posters, pamphlets, displays, audiovisual materials, postage, food, and printing)?
		Background checks (e.g., criminal, driving record, and professional license)?
		Orientation (e.g., refreshments, printing, videos, and audiovisual equipment)?
		Training for volunteers (e.g., training materials, travel and maintenance, audiovisual equipment, refreshments, scholarships, and conference fees)?
		Recognition items (e.g., postage, printing, service pins, plaques, engraving, and National Volunteer Week)?
		Recognition events (e.g., space, food, printing, and photography)?
		Supporting funds (e.g., child care, gasoline reimbursement, bus fare, and parking fees)?
		Professional memberships and fees?
		Volunteer career development costs (e.g., training, travel and maintenance, and registration fees)?
		Record-keeping supplies and equipment (e.g., locking file cabinet, computer, software, and training)?
		Identification costs (e.g., uniforms, badges, name tents, and signs)?
		Salary and benefits costs for paid staff support?

SECTION FOUR:
FORMULATING VOLUNTEER POLICIES AND PROCEDURES

Each Red Cross unit determines the regulations, policies, and procedures governing the paid and volunteer staff of that unit. Each unit should have written policies and procedures for volunteer staff that are reviewed by local legal counsel and approved by the board of directors before implementation. It is important that these policies be consistent with corporate policies and direction.

Topics often addressed in volunteer policies include the following:

- Red Cross Code of Conduct, including confidentiality
- Dispute resolution procedures, including termination
- Drug and alcohol use policy
- Violence in the workplace policy
- Sexual harassment policy
- Equal Employment Opportunity policy
- Volunteer benefits, including credit union information
- Insurance coverage*
- Unit's safety and loss control policies, procedures, and plans based on the guidance provided in *The Corporate Safety Policy Program*, CSPP, ARC 4514
- Attendance requirements, tardiness, and absenteeism
- Dress code
- Performance review procedures
- Expense reimbursement, issue of telephone, and credit cards
- Record-keeping requirements
- Use of unit facilities and services: parking, keys, lockers, coffee room, etc.
- Use of Red Cross property and equipment: vehicles, cellular telephones, etc.
- Copies of sample job descriptions

* Only the exact language in *The Corporate Risk Management and Insurance Program* (ARC 549) should be used to address insurance. Any changes to that language must be reviewed by the Division of Risk Management at national headquarters.

Volunteer Handbook

Red Cross units are encouraged to develop a handbook setting forth written policies and procedures affecting volunteer staff. The handbook can be used as an orientation guide and include information such as the following:

- Mission of the Red Cross and the unit
- Brief history of the Red Cross and the unit

- Fundamental Principles of the Red Cross and Red Crescent Movement
- Map of unit's jurisdiction
- Organizational chart
- Description of what the unit expects of each volunteer
- Description of what the volunteer can expect of the unit
- Contact name(s) for questions or problems
- Policies and procedures governing volunteer staff
- Awards and recognition information
- Emergency numbers and unit address(es)
- Building evacuation procedures
- Names of unit leadership, volunteer administration leadership, and other governance and management staff

The handbook should be made available to each registered and registered-for-credit volunteer. One method of distributing the information is to provide an individual copy of the handbook to each volunteer, with a signature page stating that it has been received and reviewed. Giving an overview of the policies during general orientation, and making copies of the document available in each department and in the volunteer administration office can also be effective. Whether or not your unit has a volunteer handbook, it is critical that volunteers know that policies and procedures exist and how to get information about them.

The *Board of Governors Policy Manual*, Part Two, Section 3.1.4, requires units to adopt a dispute resolution process. This requirement is reviewed later in this document, in Section 14. Supervising and Evaluating Volunteers.

How is Your Unit Doing?

Use the following questions to measure the effectiveness of your unit's volunteer policies and procedures. The more positive answers you have, the better you are doing.

☐ Yes ☐ No Has the unit identified the policies and procedures governing volunteer staff?
☐ Yes ☐ No Has local legal counsel reviewed the policies?
☐ Yes ☐ No Has the board of directors approved the policies?
☐ Yes ☐ No Have volunteers been notified of the policies and procedures?

SECTION FIVE: DESIGNING MEANINGFUL VOLUNTEER JOBS

Job development and design must be done with the needs of both the organization and the volunteers in mind. Whenever possible, a job should be designed with consideration as to how marketable it is to volunteers. This may require—

- Breaking the task into smaller tasks that can be accomplished by a group of volunteers working together as a team.
- Being flexible about the number of hours a volunteer must commit.
- Offering options as to when the job might be done, such as evenings or weekends.
- Including skill-building or resume-building opportunities.
- Analyzing ways that "hard-to-fill" and "hard-to-retain" positions could be modified.

Effective job descriptions need to be clear and concise, be reviewed periodically, avoid internal jargon or acronyms, and indicate which elements are flexible or negotiable.

Contents of Job Descriptions

Job descriptions for individual volunteers should include the following:

- Position title and location
- Purpose of job
- Key responsibilities, duties, and tasks
- Length of appointment or commitment
- Title of person who makes the appointment (if applicable)
- Time commitment required (hours per week or days per month)
- Relationships or reporting lines (accountable to, receives technical support from, collaborates with)
- Qualifications (education, experience, Red Cross training requirements, knowledge, skills, and abilities)
- Budget support (travel, equipment, conference fees)
- Development opportunities (in-service, work or learning experience, other career development opportunities)
- Additional requirements (criminal records background check, uniform purchase required)
- Revision date for job description is written or revised

Job descriptions for groups of volunteers should include the following:

- Project title
- Project purpose
- Location

- Specific tasks to be performed
- Number of workers needed
- Skills required
- Time commitment required
- Ongoing project or one-time commitment
- Benefits to the group (lunch, T-shirts, transportation)
- Additional job requirements (screening, licensure requirements, physical requirements)
- Revision date for job description

Attachment 5.1 is a sample volunteer job description form for individuals, and Attachment 5.2 is a sample volunteer job description form for groups.

Job Descriptions as a Management Tool

Job descriptions are a management tool for the volunteer administrator. The position description is—

- The first step in the recruitment process. Identifying and defining the needs helps to target volunteer recruitment to fill those needs.
- A tool for marketing the organization's need to potential volunteers.
- A focal point of the interview and screening process. The interview can be structured around the position description and, in many cases, the position description helps the interviewee to self-screen.
- The basis for mutual, written agreement in the placement stage. Expectations can be clarified by having the job description signed by the volunteer, a representative of the hiring department, and the volunteer administrator. This avoids the frequent mistake of "twisting the arm" of a potential volunteer to accept a greater (or lesser) commitment or more (or less) responsibility than that person may want at the present time.
- The tool for measurable criteria for supervision and evaluation. Duties and commitments identified in the position description can be used to measure how effectively the work is being done.

The volunteer administrator can assist others in the unit to define their volunteer needs by—

- Creating a simple, fill-in-the-blank form including suggestions for completion.
- Offering to assist supervisors of volunteers who do not currently prepare job descriptions.
- Giving training in job design and writing job descriptions.

Designing the job and preparing the job description provide an excellent opportunity to evaluate the readiness of your unit for the placement of the volunteer or volunteer group in the job. Before placement, review the job description and the needs assessment to ensure that the organization, the department, and the supervisor have all the necessary tools to support the volunteer.

How is Your Unit Doing?

Use the following questions to measure the effectiveness of your unit's volunteer job descriptions. The more positive answers you have, the better you're doing.

- ☐ Yes ☐ No Do we design jobs with the needs of both the organization and the volunteer in mind?
- ☐ Yes ☐ No Do we develop job descriptions with specific criteria and clear information?
- ☐ Yes ☐ No Do we use the job descriptions as a management tool?
- ☐ Yes ☐ No Does every job have a description?
- ☐ Yes ☐ No Do we use the job description in the interview process?

Job Description for Individual Volunteer

American Red Cross

Attachment 5.1

Date	
Location	
Job Title	
Purpose	*Describe specific purpose in 1-2 sentences. State in terms of Red Cross mission, goals, and/or benefits to the community.*
Key Responsibilities	*List no more than 5-7 major duties.*
Appointed by	
Reports to or Partners With	
Length of Appointment	*Give month/year for projects. Include any restrictions (e.g., not to exceed three years).*
Time Commitment	*State approximate number of days or hours required per week. For leadership volunteers, list meeting attendance requirements. State whether time requirements are fixed or flexible.*
Relationships	*Accountable to, receives technical support from, collaborates with.*
Qualifications	*List education, experience, knowledge, and skills required.*
Support Provided	*List budget-related resources provided for the job (e.g., travel and maintenance, computer equipment, telephone, fax, work space, training).*
Development Opportunities	*List Red Cross or externally sponsored courses, conferences, seminars; list opportunities for participation in other Red Cross activities and collaborations outside the unit.*

Job Description for Group of Volunteers **Attachment 5.2**

American Red Cross

Project/Event:____

Date/Time: Beginning ____________________Ending __________________

Purpose: *(Relate to Red Cross mission, and how community will benefit from assignment)*

____

____

____

Tasks to Be Completed	Skills/Qualifications/Age Requirements

Number of volunteers needed: __________ Approximate time required: __________________

Special Considerations:____________________________________
(weather conditions, physical condition, etc.)

Benefits: ____
(T-shirts, lunch, recognition, etc.)

____

Supervised by: ________________________Department: __________________

Assigned to: ____

Contact Name: ___________________________Phone: __________________

- The Red Cross reflects the community in its volunteer population--a racial, ethnic, and gender cross-section of all ages, including working and nonworking people with all types and levels of skills.
- The Red Cross has a variety of volunteer opportunities.
- The Red Cross directly addresses problems and concerns in the community.

Remember to always communicate consistent images of the vital roles of volunteers. By communicating these images, you are showing that Red Cross services and Red Cross community volunteers are inseparable. With increased competition for volunteers from all sizes and types of community organizations, you need to be sure that the Red Cross name is firmly and consistently associated with volunteerism.

When developing your marketing and communications strategies, remember that the media market is now global, instantaneously broadcasting information from one area to the next. The Red Cross is highly visible in the media during times of disaster, military deployments, or international refugee repatriation. This visibility often generates interest among potential volunteers in your community. Volunteer administrators should seize these opportunities immediately in order to maximize visibility in their community, rather than continuing with a predetermined marketing plan.

How is Your Unit Doing?

Use the following questions to measure your unit's marketing effectiveness. The more positive answers you have, the better you are doing.

□Yes □ No	Has your unit developed an all-encompassing plan for promoting its mission and services and the role of volunteers in the delivery of services?
□Yes □ No	Are you aware of the common misconceptions about the Red Cross? About Red Cross volunteering? Have you developed strategies to dispel those misconceptions?
□Yes □ No	Do you effectively communicate the vital role of community-based volunteers providing community-based services in all your materials?
□Yes □ No	Do you consistently associate volunteerism with the Red Cross messages and images you communicate to the community?

SECTION SIX: UNDERSTANDING VOLUNTEER MOTIVATION

People who volunteer expect to receive something from the volunteer experience. Individuals now scrutinize volunteer opportunities to determine if their needs can be met when they volunteer. To attract and retain volunteers, the volunteer's expectations and motivations should be understood and matched with the needs of the organization.

Why a Person Volunteers

Although the desire to "do good" is usually one of the motivating factors, often there are others, such as —

- Gaining experience for a career change.
- Networking, or donating professional skills.
- Making friends, socializing, or becoming involved in the community.
- Earning academic credit or performing required service.
- Developing new skills and interests, or building self-confidence.
- Maintaining skills while out of the paid workforce.

Assumptions about what motivates a volunteer and what that volunteer expects based on a volunteer's career, community position, education, or age are not always accurate. The best way to determine the volunteer's motivation and expectations is simply to ask the volunteer. The following questions should help:

- What gives you the greatest sense of satisfaction when doing a job?
  — A sense of "community" among your co-workers?
  — A sense of accomplishment after completing the task?
  — A sense of leadership and your ability to motivate and manage others?
- What have you enjoyed most or least in other paid or volunteer positions?
- How do you think others would describe your personal work style?
- Why did you select the Red Cross as a place to offer your time and skills as a volunteer?

Applying Motivational Theory

An appealing job is one of the best motivators for volunteers. While some tasks associated with a job may be rote and uninteresting, the overall job can be designed to be exciting and interesting. A job can also be adjusted to meet an individual's expectations by varying hours, co-workers, training benefits, location of work, or other components of the job.

A Red Cross unit may not currently have a position available that meets a volunteer's interests or motivation. While the unit is encouraged to be flexible in accommodating the needs of a potential volunteer, the needs of the unit should also be considered. If there is no match between the volunteer's interests and the needs of the unit, the volunteer administrator should consider referring a potential volunteer to another organization that better matches the volunteer's needs.

How is Your Unit Doing?

Use the following questions to measure your unit's awareness of volunteer motivation. The more positive answers you have, the better you are doing.

□ Yes □ No	Do we promote the personal benefits of volunteering in Red Cross recruitment materials?
□ Yes □ No	Do paid and volunteer staff who work with volunteers understand the connection between personal motivation and job satisfaction?
□ Yes □ No	Do we look carefully at all our volunteer jobs from the perspective of personal motivation? — What motivational needs would each position best satisfy? — What motivational type would be best suited to each position?

SECTION SEVEN: MARKETING VOLUNTEER JOBS AND VOLUNTEERING

Marketing can expand potential volunteer interest, while promoting every aspect of the American Red Cross and its vital mission in the community. Effective marketing will also—

- Reflect the values of the Red Cross.
- Position the Red Cross as a dynamic, community-based organization that people want to join and support.
- Articulate the "exchange relationship" between the unit and its "publics" (for example, funders, volunteers, service recipients, and businesses).

Let's take a closer look at the exchange relationship between volunteers and the unit:

The Red Cross Unit	The Exchange	The Volunteer
Needs skilled volunteers------->	Opportunities to apply skills	<---------------Has needed skills
Needs *specific* availability----->	Time range for involvement	<-----------------Has availability
Has positive name recognition and reputation --------->	Public awareness and positive reputation	<--------Wants to volunteer with high-profile organization
Has community-centered opportunities ------------------->	Community-centered reciprocity	<----Wants to make a difference in the community
Has youth volunteer opportunities ------------------->	Youth involvement	<---------Needs academic credit for community service

A key goal of your marketing plan should be to position your unit as a vital organization that serves the community every day. Here are some common misconceptions of the Red Cross that you should try to correct:

- The Red Cross is so large and so well-established that it does not need volunteer help to carry out its mission.
- Red Cross volunteers are primarily white, middle-class, and middle-aged.
- Red Cross volunteer opportunities are limited to blood drives or response to disasters.
- The Red Cross is a governmental agency.

In all of its communications and materials, the unit must dispel these misconceptions by showing that —

- The Red Cross is a local, community-based organization that provides services to citizens of the community through fellow citizens who volunteer.

SECTION EIGHT: RECRUITING VOLUNTEERS

Clear identification of your unit's needs and a well-developed plan for recruiting to meet these needs will strengthen the position of the Red Cross in the community's volunteer marketplace. Continual marketing of these needs lays the foundation for recruitment of target audiences.

Recruitment Messages

The recruitment message can be delivered in both formal and informal formats. Personal phone calls, presentations to community groups, flyers at a community fair, or endorsements by local radio stations can all be effective in recruiting volunteers. Regardless of the medium of the "ask," the recruitment message needs to contain these components:

- Statement of the need
- Explanation of how the potential volunteer can help meet the need
- Outline of the benefits the potential volunteer will receive
- The "ask" or request for the person to volunteer

Recruitment is most effectively done when the individual or group and the recruiter know each other or can strongly identify with each other. After formulating the recruitment message, the next step is determining who the best recruiter will be. Examples are—

- Current Red Cross volunteers from the target audience.
- Local celebrities.
- Target audience leaders.
- Red Cross leadership volunteers.

The best recruiter is a satisfied volunteer who shares the experience with friends, neighbors and co-workers and asks them to volunteer. The Independent Sector studies consistently indicate that people are four times more likely to volunteer if they are asked. Being asked to volunteer by someone they know increases the likelihood that they will say yes.

Recruitment Plan

Recruitment is an ongoing process. A year-round, structured recruitment process, which takes into account each department's needs, should be developed and maintained. Episodic needs for volunteers, such as community CPR day, large blood drives, a fund-raising event, chapter clean-up day, and World Red Cross Day, should also be included in the annual recruitment plan.

Although all unit staff participate in the recruitment planning process, the volunteer administration office is responsible for the management of the unit's recruitment plan.

Appointment of a recruitment committee can provide direction and management for the recruitment process. This advisory committee should include or have access to—

- Representatives from all departments within the unit that involve volunteers.
- Representatives from groups to be targeted—especially those who are already a part of the Red Cross volunteer corps.
- Marketing and communication experts.
- Appropriate community contacts, including leaders from civic, neighborhood, and professional associations, from diverse ethnic, racial, and socioeconomic groups, and from volunteer referral organizations such as the Volunteer Center and City Cares.

Steps in the Recruitment Process

Steps in the recruitment process do not always happen in chronological order. However, a thorough recruitment plan requires attention to each of the steps listed. Listed below are steps to follow in your volunteer recruitment process:

1. Identify the unit's volunteer needs.
2. Identify the target audiences that might meet the need.
3. Identify the human and material resources needed to conduct a recruitment campaign.
4. Develop strategies for collecting the required resources and for reaching target audiences.
5. Develop a unit calendar for implementing the strategies.
6. Ensure that the unit is ready to begin interviews for new volunteers.
7. Implement the strategies.
8. Evaluate the results of the recruitment efforts.

Targeting by Need

Recruitment campaigns are often more successful when a target audience is selected for a specific volunteer job. Common reasons for targeting a particular audience are—

- To increase participation of specific populations (for example, youth, young adults, retirees, specific ethnic or cultural groups).
- To obtain particular skills, experience, or qualifications (for example, nurses, trainers, data processors, food service operators, human resources managers).
- To fill positions during a particular time period (for example, daytime for bloodmobiles, nighttime Disaster Action Team response, summertime for youth activities).
- To increase volunteer involvement in a particular line of service or support area (for example, fund raising, clerical, caseworkers).

It is important to know your community in order to mirror it in your volunteer workforce. Answer these questions about your community to help you plan a campaign to recruit volunteers that reflect the diversity of your community:

- What is the demographic, cultural, ethnic, and racial makeup of the community?
- How is the Red Cross viewed in the community as a whole? Within specific populations?
- Who are the leaders and influential people in each diverse population in your community?
- Do the board of directors and your unit's paid and volunteer staff mirror the community's diversity?
- Is a commitment to diversity supported through investments of time, staff involvement, and material resources?

It is also important to know the characteristics of the groups to be targeted in the campaign in order to adapt the recruitment message and materials. The best resources for information about a group are members of the group. When units have initiatives to recruit from specific populations such as young adults or a specific ethnic group, the volunteer jobs may need to be adapted so they are attractive or feasible for the group. Existing job descriptions may need to be reviewed and revised for the targeted campaign.

See Attachments 8.1, 8.2, and 8.3 for recommendations on how a unit could target youth, young adults, working-age adults, and retirees.

Offers of Help

When the Red Cross is prominent in the media because of national or international response to a crisis, individuals or groups in your community may offer their help. These offers can range from a specific offer of professional expertise to the simple statement "I just want to help." A well-established recruitment plan can adjust to this sudden influx of interested volunteers, and change strategies from reaching out into the community to responding quickly to incoming offers.

It is critical to respond to these offers quickly, even though all individuals may not be placed. A timely response can create a positive first contact between the community member and the Red Cross, leading to a favorable image of the organization in your community.

The recruitment message and medium should be adjusted to this group. The statement of need in the recruitment message should begin with the Red Cross response to the current crisis, which sparked the interest of the volunteer, and tie this response to the need in your local community. Any printed materials on volunteering should be available for immediate distribution.

The volume of offers can be overwhelming for the unit, with the possibility of hundreds of calls in a single day. Some methods of responding to these offers include—

- Providing phone coverage during evenings and weekends while call volume is still high. Current volunteers are very effective in this role.
- Creating a temporary phone bank if the burden on the unit's phone system is overwhelming.

- Writing a phone script, including the components of the recruitment message and the Red Cross response to the current crisis.
- Capturing information about potential volunteers through a phone intake log.
- Hosting a volunteer fair, with information stations on current volunteer opportunities staffed by volunteers in those positions. This method will be most effective if held within one week of the individuals' first contact.
- Scheduling additional general orientation sessions or basic training courses.

The volunteer administrator should ensure that the intake process can be adjusted to meet this unusually high demand. A preidentified team, perhaps a subgroup of the recruitment committee, can assist in managing response to spontaneous volunteers.

Evaluation

The final step in a well-organized recruitment effort is to evaluate the results of the recruitment effort. Before you start the recruitment process, define expectations for success by establishing specific, attainable goals. Quantify time frames, people, jobs, and contacts so that the goals can be measured. Some measures of recruitment success are—

- Number of inquiries or applications received.
- Number of volunteers placed.
- The number of recruitment contacts made such as flyers distributed, group presentations, and media spots.

Evaluating the recruitment effort provides an opportunity to identify directions for future recruitment planning.

How is Your Unit Doing?

Use the following questions to measure the effectiveness of your unit's recruitment program. The more positive answers you have, the better you are doing.

☐Yes ☐ No Have we laid the groundwork for successful volunteer recruitment with ongoing marketing of the role of volunteers in the Red Cross?

☐Yes ☐ No Do our marketing efforts position the Red Cross as a vital organization that serves our entire community every day?

☐Yes ☐ No Is the entire staff— paid and volunteer— involved in the volunteer recruitment effort?

☐Yes ☐ No Have we identified our target markets?

☐Yes ☐ No Does our workforce reflect the diversity of the communities we serve?

☐Yes ☐ No Have we cultivated a network of community contacts, or "door openers," who will help us convey our message?

- ☐Yes ☐ No Have we designed target recruitment campaigns on the basis of input from the annual needs assessment?
- ☐Yes ☐ No Have we revised our position descriptions in response to current trends in volunteering?
- ☐Yes ☐ No Can we adapt our volunteer training sessions and activities to the schedules of youth and young adults? Working-age adults? Special audiences?
- ☐Yes ☐ No Do we personalize our recruitment message and overall media campaign for target markets?
- ☐Yes ☐ No Have we created an annual recruitment calendar that is responsive to seasonal needs?
- ☐Yes ☐ No Can our unit quickly adjust to a sudden influx of spontaneous volunteers?
- ☐Yes ☐ No Have we evaluated the effectiveness of each recruitment campaign and revised strategies, materials, and techniques for future campaigns?
- ☐Yes ☐ No Have we taken the time to identify and eliminate obstacles that might stand in the way of prospective volunteers' commitment?

Attachment 8.1

TARGETED RECRUITMENT GUIDE
YOUTH AND YOUNG ADULTS

Information the Unit Should Know Before Recruiting Youth or Young Adults

- Can we adapt training sessions and volunteer activities to the schedules of students?
- Do we have meaningful activities for youth and young adults?
- Will we process the necessary paperwork if students want to receive academic credit?
- What jobs are appropriate for each age group (elementary school, middle school, high school, and college)?

Expectations of Volunteers:

- Socializing; opportunity to meet new people
- Altruistic and personal gains
- Excitement
- Enhancement of college and employment applications
- Opportunity to gain experiences that strengthen resumes
- Activities that address community needs

Ways to Attract Youth and Young Adults

1. Increase Red Cross visibility:
   — Place recruitment materials on campus.
   — Establish Red Cross clubs on campus and in schools.
   — Ask principals, teachers, and guidance staff to serve as "ambassadors."
   — Place materials in fast-food outlets, music stores, and other sites frequented by students.
   — Establish a presence at high-visibility school events.
   — Speak to student leaders at their groups (for example, student council or Key Club).
   — Distribute materials to dormitories, student unions, bookstores, and student hangouts.
   — Host educational booths at community festivals or concerts.

2. Use both high-tech and traditional media to reach students:
   — Set up a Web site.
   — Use campus radio stations and newspapers.
   — Have college volunteers appear on radio and TV talk shows.
   — Advertise on theater marquees and sports scoreboards.

3. Use role models to promote the value of volunteerism:
   — Develop a special recruitment campaign for youth with a youth-oriented radio station.
   — Enlist the support of local bands that play at dances and parties.
   — Recruit a local celebrity (athlete, entertainer, DJ) as the spokesperson.

TARGETED RECRUITMENT GUIDE
WORKING-AGE ADULTS

Information the Unit Should Know Before Recruiting Working-Age Adults
- Can activities and training schedules be adapted to match the available time of working-age adults (for example, nighttime, lunch hours, and weekends)?
- Can the volunteer job be adapted to involve other family members, such as spouses, children, or extended family members?
- Can we target our appeal through labor unions? Small businesses? Corporations?
- Do we have quality jobs that recognize the value of their time?

Characteristics of Working-Age Adults
- They react positively to materials that show caring for and helping people in need.
- They display altruistic concerns.
- They may have an interest in the needs of the elderly and of youth.
- Volunteerism provides both professional development and personal benefits.
- They may wish to volunteer as a group.

Ways to Attract Working Adults

1. Promote Red Cross volunteer opportunities through corporations and labor unions:
   — Distribute materials in paycheck envelopes and "new hire" packets.
   — Offer brown-bag lunch sessions and distribute materials describing volunteer opportunities.
   — Work with corporate volunteer councils.
   — Participate in United Way campaigns.

2. Recruit through civic and religious organizations:
   — Supply alumni publications with profiles of alumni who volunteer for the Red Cross.
   — Ask clergy to distribute materials through programs for adults.

3. Distribute recruitment materials through support services used by working-age adults:
   — Display materials in video rental stores, dry cleaners, health and fitness centers, auto dealerships, repair shops, doctors' and dentists' offices.
   — Enlist the support of local banks and supermarkets.
   — Provide local churches and synagogues with bulletin or newsletter inserts.

4. Disseminate messages and materials through technology in services patronized by working-age adults:
   — On supermarket video monitors and shopping carts.
   — On electronic bulletin boards.
   — On rail passes, bus cards, and subway posters.

TARGETED RECRUITMENT GUIDE
RETIREES AND PRERETIREES

Information the Unit Should Know Before Recruiting Retirees

- What activities are available that will satisfy the needs and interests of retirees?
- Can we adapt training schedules and locations to suit retirees and pre-retirees?
- Do we have activities that are appropriate for less active or mobile older persons, including the housebound?
- Will older persons meet new people through these activities?
- Can our unit bring activities directly to volunteers?

Expectations of Volunteers:

- Sharing skills and life experiences
- Meeting other people
- Fulfilling altruistic needs
- Challenging, interesting work

Ways to Attract Retirees

1. Involve current volunteers of all ages as promoters of volunteerism among older persons:
   — Enlist younger volunteers to distribute materials and personally recruit older persons.
   — Enlist older volunteers to recruit friends and acquaintances.
   — Engage Red Cross retirees to network.

2. Distribute recruitment materials through targeted media and in areas known to attract older persons:
   — Retirement condominiums and communities
   — Long-established residential neighborhoods
   — Mobile-home developments
   — Transportation vehicles in retirement communities
   — Community centers, supermarkets, drugstores, doctors' offices, and shopping centers
   — Professional retirement groups

3. Conduct recruitment activities that also serve as social functions for older adults:
   — Blood donor "phone-a-thon" at a retirement community
   — Educational program on, for example, accident prevention, CPR, nutrition and other programs relevant to older persons
   — "Appreciation night" for older volunteers as a means of peer recruitment

SECTION NINE: INTERVIEWING POTENTIAL VOLUNTEERS

An interview is an exchange of information between a potential volunteer and a paid or volunteer staff member of the Red Cross. An effective interview will—

- Determine the prospective volunteer's skills and motivation for volunteering.
- Encourage the prospective volunteer to ask questions and describe his or her interests.
- Provide information on the scope of available positions, the duties and skills related to them, the time required, the training needed, and any uniform requirements.
- Help match skills, knowledge, interests, and motivation to various job opportunities.
- Explain the role of the volunteer administrator and the volunteer administration office.
- Provide a referral to another agency if it is obvious that the Red Cross cannot use the prospect's services.
- Help identify undesirable candidates. Careful attention at this time may eliminate later problems and possible termination.

Planning the Interview

The time and place of an interview should be set up for the convenience of the prospective volunteer. Flexibility is important and "on the spot" interviews may be needed occasionally. A sense of privacy during interviews is also important.

A screening interview should be arranged as soon as possible after an individual has indicated interest. A good volunteer may be lost if kept "dangling." The screening interview should—

- Be conducted by the volunteer administration office.
- Gather basic information about the potential volunteer.
- Give basic information about the Red Cross and current volunteer opportunities.

From the screening interview, the interviewer should be able to gain a sense of the interviewee's motivation, skills, interest, and time availability. Referrals for a placement interview should then be made to the service and/or the person who is responsible for supervising the particular volunteer job. The purpose of the placement interview is to determine whether the person is appropriate for a specific job. The placement interview should be scheduled within one week of the screening interview.

A good first impression of the Red Cross can persuade a person to become a volunteer. The way a potential volunteer is greeted and the way his or her questions are answered very often determine whether he or she will join the organization. Usually a person is still deciding whether or not to volunteer with the Red Cross when he or she is interviewed. Attachment 9.1 offers suggestions on creating a positive first impression about your unit for potential volunteers.

Effective Interviewers

The individuals who are responsible for interviewing prospective volunteers should be well trained and prepared for this process. Units should recruit experienced interviewers or obtain information on training programs regarding interviewing. A self-assessment tool for beginning interviewers is included as Attachment 9.2. Whenever possible, interviewers should be volunteers, since satisfied volunteers can most effectively communicate with potential volunteers. An effective interviewer should be—

- Accepting of people from diverse backgrounds.
- Willing to listen to other people and allow them to make their own decisions.
- Enthusiastic about volunteerism and the Red Cross.

The interviewer will also need some basic tools to conduct an informative interview:

- Locally developed application form
- Form for recording the interview
- List of open-ended interview questions
- Detailed information about current volunteer opportunities

See Attachment 9.3 for a sample application form.

Interview Questions

During the interview, be sure to ask open-ended questions that will encourage the potential volunteer to talk about himself or herself. Prepare a few possible scenarios or problem situations that a volunteer might confront in the position that is being discussed. You might ask—

- How would you respond in this situation?
- What would you do if ...?
- Have you ever had to ...?

There are a number of questions that you may not legally ask during interviews. Any paid or volunteer staff person who has the responsibility of interviewing potential volunteers should be fully aware of these questions. Questions that may not be asked during an interview include—

- Race, national origin, or birthplace
- Age, height, or weight
- Marital status
- Child care arrangements or pregnancy
- Religious affiliation
- Arrest record
- English-language skill

- Discharge from military service
- Credit card or home ownership
- Length of residency in community
- Health of the interviewee

In general, do not ask anything not directly related to the ability of the applicant to perform the specific volunteer job. If the volunteer position requires the ability to perform a specific physical task, such as lifting 50 pound objects, and that requirement is specifically listed on the job description, the interviewer can ask whether the potential volunteer is able to meet that specific requirement. The interview question must be limited to the specific requirements listed on the job description, rather than general inquiries regarding health.

Positions Requiring Further Screening

A volunteer position may require reference and/or criminal record checks, especially those involving work with vulnerable populations or requiring the volunteer to drive. During the placement interview, if the potential volunteer has indicated an interest in a position requiring additional information before placement, you must explain this requirement and obtain a signed waiver and consent statement.

How is Your Unit Doing?

Use the following questions to measure the effectiveness of your unit's interviewing process. The more positive answers you have, the better you are doing.

☐ Yes ☐ No Are all interviewers trained in basic interview techniques, including how to maximize the exchange of information and which questions may not be asked?
☐ Yes ☐ No Are screening interviews scheduled quickly after the potential volunteer indicates interest?
☐ Yes ☐ No Do placement interviews follow screening interviews within one week?
☐ Yes ☐ No Is a volunteer application form completed by all potential volunteers?

GIVING NEW VOLUNTEERS THE RIGHT IMPRESSION ABOUT YOUR UNIT

First Impression	Unit's Preparation
Telephone Inquiries & Referrals	◆ Training for all appropriate staff ◆ Script including frequently asked questions and basic information ◆ Telephone "tree" to make appropriate transfer of calls ◆ Phone intake form for consistent data on all calls ◆ Designated staff to reply to Internet inquiries ◆ Standards for maximum time to respond to phone calls and e-mail
Atmosphere of Workplace	◆ Accessibility ◆ Accuracy of directions to site (automobile and public transportation) ◆ Availability of parking ◆ Safety and security ◆ Adequate and welcoming workspace ◆ Evidence of service and volunteer involvement (newspaper clippings, thank-you letters, bulletin boards) ◆ Diversity of staff (Will the potential volunteer see anyone who looks like him or her?)
Greeting	◆ Training for staff about importance of cordially greeting potential volunteers ◆ Reception area that is comfortable and inviting ◆ Availability of Red Cross literature, brochures, newsletters, etc. ◆ Availability of forms (volunteer application, registration) and pens
Responsiveness to Questions & Concerns	◆ Immediate answers to the most frequently asked questions and concerns—prepare handout, train staff ◆ Current listing of volunteer opportunities ◆ Information packets for distribution to all potential volunteers
Availability & Punctuality	◆ Willingness of staff to take time to answer questions ◆ Respect for potential volunteer's time, including keeping appointments at time designated

Self-Assessment Tool for Beginning Interviewer

INTERVIEW CONTENT	YES	NO	N/A	COMMENTS:
BEFORE THE INTERVIEW, do you—				
Review all available information about the applicant (application form, resume)?				
Review your knowledge of the Red Cross--history, philosophy, principles, support, programs?				
Formulate your questions, and make an outline of information you want to obtain from applicant?				
Schedule enough time for the interview?				
CONDUCTING THE INTERVIEW, do you—				
Maintain an open, welcoming atmosphere?				
Obtain specifically needed information about the applicant?				
Direct the applicant's conversation toward relevant channels of information?				
Ask open-ended questions?				
Ascertain the applicant's motivations?				
ARE YOU LISTENING to the applicant? Do you—				
Indicate by brief, relevant comments or questions that you have been listening?				
Realize that periods of silence may be helpful and may encourage the applicant to talk more freely?				
GIVING INFORMATION, do you—				
Give information based on the applicant's interests, skills, and the volunteer programs related to them?				
Give the information that the applicant needs in order to make a decision?				
Give the necessary information about the job to be done and answer the applicant's questions?				
Remember not to undersell the job or its requirements?				
CLOSING THE INTERVIEW, do you—				
Maintain a reasonable time frame for the interview?				

Ensure that , **when the applicant is acceptable for the position**, he or she— • Has wholeheartedly made a final choice? • Knows how to get information about the specific assignment? • Knows what future placement opportunities may exist if no suitable placement is presently available?				
Determine that the applicant is qualified to do the work required? If you have doubts, consult with someone else.				
When the applicant is not acceptable, do you— • Close the interview graciously and with tact? • Suggest a referral to another agency, if appropriate? • In accordance with local policy, either inform the candidate at the interview, or send a letter with the unit's decision not to accept the applicant?				
EVALUATING THE INTERVIEW, do you—				
Evaluate your listening techniques?				
Ask appropriate questions to get all needed information?				
Evaluate all information rather than focusing on a specific positive or negative impression?				
RECORDING THE INTERVIEW, do you—				
Record only factual material during the interview?				
Review the notes taken and make additions while the conversation is fresh in your mind?				
Summarize the pros and cons of the applicant? Trust your first impressions; quickly write what you think.				
Obtain any additional information needed from other sources?				
Make recommendations of action to be taken?				

Interviewee: ______________________ Street Address: ______________________
City, State, Zipcode: ______________________ Telephone: ______________________

Interviewer: ______________________ Date: ______________________
Additional Comments:

Attachment 9.3

AMERICAN RED CROSS

VOLUNTEER APPLICATION FORM

Last Name	First	Middle	
Home Address	**City**	**State**	**Zipcode**
Business Address	**City**	**State**	**Zipcode**
Home Phone	**Business Phone**	**E-Mail Address**	**Fax Number**

Experience: (Include both paid and volunteer work experience, beginning with most recent)

Organization Name	Address	Phone
From ________ To ________	Supervisor's Name/Title	
Organization Name	Address	Phone
From ________ To ________	Supervisor's Name/Title	
Organization Name	Address	Phone
From ________ To ________	Supervisor's Name/Title	

Current License(s)

Type:	Number:	State:	Expiration Date:
Type:	Number:	State:	Expiration Date:

Education and Training (begin with most recent)

Institution Name	City/State	Degree/Major	Date Attended

Fluent Language Skills (include sign language)

Volunteer Opportunities: Check Activities Which Interest You or Skills You Possess *(Units Adapt for Local Opportunity and Need)*

- ☐ Blood Services
- ☐ First Aid Stations
- ☐ CPR/First Aid Education
- ☐ HIV/AIDS Education
- ☐ Disaster Education
- ☐ Tracing
- ☐ Water Safety
- ☐ Disaster Services
- ☐ Special Events/Projects
- ☐ AFES
- ☐ Hospital Services
- ☐ International Services
- ☐ I.H.L. Training
- ☐ Youth Programs
- ☐ Administrative
- ☐ Casework
- ☐ Telerecruitment
- ☐ Finance
- ☐ Communications
- ☐ Word Processing
- ☐ Development
- ☐ Leadership
- ☐ Other: ____________
- ☐ Teaching
- ☐ Fund Raising
- ☐ Public Relations
- ☐ Marketing

Availability:

☐ Monday Morning/Afternoon/Evening	☐ Tuesday Morning/Afternoon/Evening	☐ Wednesday Morning/Afternoon/Evening	☐ Thursday Morning/Afternoon/Evening	☐ Friday Morning/Afternoon/Evening	☐ Saturday Morning/Afternoon/Evening	☐ Sunday Morning/Afternoon/Evening

Are you available for a short-term project?	Yes	No

Emergency Contact Information:

Name	Relationship	Address	Phone

Previous Red Cross Experience:

Have you ever worked as a Red Cross employee? *If Yes, Give Position, Dates, and Location.*	Yes	No
Have you ever worked as a Red Cross volunteer?	Yes	No
Have you ever held any Red Cross certification (e.g., Health & Safety instructor, DSHR member)? *If yes, please list.*	Yes	No

A "yes" answer to the following italicized questions will not necessarily disqualify any applicant.

Are you licensed to operate a motor vehicle in this state?	Yes	No
Has your license to operate a motor vehicle ever been revoked? If yes, please explain.	Yes	No
Have you ever been bonded?	Yes	No
Has your bonding ever been revoked? If yes, please explain.	Yes	No
Have you ever been convicted of a felony, or within the past 24 months, of a misdemeanor that resulted in imprisonment? If yes, please explain.	Yes	No
Have any of your Red Cross certification ever been revoked? If yes, please explain.	Yes	No

Why do you wish to volunteer with the American Red Cross *(optional)*:

VOLUNTEER CONSENT FOR REFERENCE AND BACKGROUND CHECKS

I do hereby give the American Red Cross permission to inquire into my educational background, references, driving record, police records, employment, and/or volunteer history. I further give permission to the holder of any such records to release the same to the American Red Cross.

I do hereby hold the American Red Cross harmless from any liability, whether civil or criminal, that may arise as a result of the release of this information about me. I further hold harmless any individual, agency, business, or corporation that provides information or documents to the above-named American Red Cross unit. I understand that the American Red Cross will use this information as part of its verification of my volunteer application and periodically for evaluation purposes.

Name—Please Print ____________________ Social Security Number ____________________

Signature ____________________ Date ____________________

Witness ____________________ Date ____________________

SECTION TEN: SCREENING VOLUNTEER APPLICANTS

Appropriate screening of volunteers before placement can help to prevent placing those with previous records of inappropriate actions and/or criminal misconduct. The public expects the Red Cross has appropriately screened its workers and would not knowingly expose its clients to persons inappropriate for the position.

All information obtained through screening is confidential and should be kept under strict control. The volunteer administration office should maintain volunteer information, such as the consent form, on all unit volunteers and release that information only to those with a business "need-to-know."

Screening Intensity

All volunteers should receive some level of screening. It is critical that all applicants, whether paid or volunteer, for a particular position undergo the same type of screening. The intensity of the screening is determined by the amount of risk associated with the position for which the volunteer is being considered. Some of the potential risks to consider include—

- Amount of time volunteer will have alone with clients, customers, employees, and other volunteers.
- Degree of dependency that clients or customers will have on the volunteer.
- Frequency of contact with clients.
- Length of time the commitment will last (duration of relationship).
- Level of client vulnerability (for example, clients who are youth, the elderly or people with disabilities).
- Resources, particularly financial, the volunteer will control.

While Red Cross units assume certain risks when they recruit and place paid and volunteer staff in any position, they must be especially careful in placing people in positions with higher risks. These involve—

- Working with vulnerable populations such as children and youth, the elderly, and individuals with disabilities.
- Management or handling of funds or other significant organizational material resources.
- Operation of vehicles.
- Requirements for specific licenses, skills, and/or educational levels.

Federal, state, and local laws often regulate screening and background checks. The volunteer administrator should consult with the unit's legal counsel to obtain accurate information on local requirements affecting screening. Red Cross units are encouraged to adopt screening standards similar to or higher than those used by other agencies working with similar populations or activities. For example, if criminal background checks for certain positions, such as those involving work with youth or the elderly, are required by other agencies, Red Cross units are encouraged to require criminal background checks for comparable volunteer positions.

Volunteers may begin in a lower risk-position in the unit and later transfer to a higher-risk position. Screening should not be a one-time occurrence, however, and moving to a new volunteer position within the unit may require additional screening. Screening requirements that are specific to positions should apply to new volunteers as well as volunteers transferring to new positions.

Common Screening Tools

Job Description

The job description should be written so that potential volunteers can determine whether they are suitable for the job. The job description should clearly state what the key responsibilities of the job are or, in some cases, are not. If more intensive screening, such as background checks or motor vehicle records checks, are required for the position, then it should be clearly stated that results from these screenings will be used to determine whether the potential volunteer is placed in the position.

Volunteer Application

The application is the initial screening tool because it—

- Directly asks for information that can identify whether or not the volunteer has the background and experience to be matched to an available job.
- Provides basic information necessary for more intensive screening.
- Often includes the waiver and consent form necessary to conduct more intensive screening.

The applicant must authorize the Red Cross to verify information on his or her application and to conduct additional screening, such as checking references, motor vehicle licenses, and any criminal background. The volunteer application should therefore include a consent form to be signed and dated by applicants that waives any rights they have to bring action for defamation, invasion of privacy, or any similar complaint against the organization or anyone contacted by the organization. See Attachment 9.3 for a sample volunteer application with a consent statement.

A typical consent statement should include—

- Verification by the applicant that the information he or she has provided is accurate.
- A waiver of rights to confidentiality for screening-related inquiries for both the organization or individual giving the information and the Red Cross.

- Specific identification of the types of screenings to be conducted.

Interview

Although the interview can be a good screening tool, it should not be the sole screening tool. As a screening tool, the interview can—

- Allow for more in-depth exploration of information from the volunteer's application.
- Reveal positive or negative characteristics that could influence placement or indicate that further screening is necessary.
- Verify the accuracy of the information provided on the application.

Reference Check

Before checking references, prepare questions that elicit the desired information related to the job requirements. Avoid questions that can be answered with only a yes or no. For example, ask questions such as—

- In what capacity have you known the applicant? For how long?
- How does the applicant relate to (co-workers, youth, and people in position of authority)?
- How would you describe the applicant?
- To the best of your knowledge, has the applicant ever been accused or convicted of a crime?
- How does the applicant manage conflict, frustration, or other stressful situations?
- Would you be willing to have this person work for you again? Why?
- Is there anything more you would like to tell me about the applicant?

It is important to make an attempt to talk directly with the reference contact. Increasingly, employers and other references will not respond to a request for information because of fear of defamation lawsuits, although such lawsuits are not frequent. Consequently, it is important to assure the reference source that a release has been obtained from the applicant.

When a volunteer transfers from one Red Cross unit to another, it is the responsibility of the volunteer's new Red Cross unit to check with the volunteer's previous unit, even if the volunteer brings relevant records with him or her. The volunteer's consent is not required, however, to inquire about his or her previous service with another Red Cross unit. Refer to "Keeping Efficient Records," Section 15, for further information about transfer of volunteer records.

Professional License, Motor Vehicle, and Criminal Background Records Checks

Records check requirements are determined by the position and risk involved, Red Cross policy, and legal statutes. Knowing that records will be checked frequently deters a potential volunteer from applying for a position for which the individual is unsuited.

Some positions require professional licenses or certifications that are regulated by federal and/or state agencies or internal Red Cross policies. Before placing staff in these positions, units should verify that all required licenses or certifications are current and valid in the jurisdiction in which the services are to be rendered.

It is recommended that the motor vehicle records of the drivers of Red Cross vehicles be screened by—

- Checking with the state department of motor vehicles to ensure that they have a satisfactory motor vehicle record.
- Checking that their driver's license is valid and that they have the proper class of license for the vehicle to be driven.
- Checking that they have completed a defensive driving course.
- Verifying that they have completed a Red Cross first aid course.

See the *American Red Cross Corporate Safety Policy Program* (ARC 4514), Part II, 1-2, for information about what to look for in motor vehicle records.

A criminal background check involves obtaining information from law enforcement or other agencies about an individual. Criminal background checks may include checking fingerprint records, arrest and conviction records, national records, state records, and the Interstate Identification Index (Triple I) file through the FBI.

Special attention should be given to the limitations of criminal background record checks because—

- No effective means exists to check all out-of-state records.
- Some systems are not automated, so records are hard to find.
- Criminal records are not always complete and accurate.
- Name searches will not find aliases or maiden names.
- Responses to requests can take several months in some jurisdictions.
- A department may not be permitted to release certain information, such as offenses committed as a youth.
- Charges may have been dropped, regardless of guilt.
- A plea bargain may have resulted in conviction for an unrelated offense.
- Some jurisdictions search only for felony convictions, not misdemeanors.
- Although fingerprinting is more effective than name or other identifying information screening, it is not available in all jurisdictions.

Recommendations for Red Cross Units

- Units are urged to consult local legal counsel to ensure that their criminal background policies and practices are consistent with federal, state, and local laws.

- Units are encouraged to establish requirements for criminal record checks for high-risk positions, such as adults who work with vulnerable populations and drivers of Red Cross vehicles.
- Units are encouraged to contact other youth-serving community organizations, childcare agencies, and schools for copies of their screening policies and procedures. Local law enforcement may also provide valuable information concerning criminal record checks.
- Units must establish screening policies if their local jurisdiction adopts a law to implement the Child Protection Act or other laws requiring criminal background checks.

How is Your Unit Doing?

Use the following questions to measure the effectiveness of your unit's screening practices. The more positive answers you have, the better you are doing.

□ Yes □ No Have we identified the positions with a higher risk for potential liability and indicated in their job description the screening requirements that must be met?

□ Yes □ No Have we reviewed state laws for screening requirements?

□ Yes □ No Have we examined the screening practices of other agencies in our community to determine whether our screening is at least as thorough as theirs is for high-risk positions?

SECTION ELEVEN:
PLACING THE NEW VOLUNTEER

New volunteers should be placed in an assignment as soon as possible after they have been interviewed, screened, and have agreed to serve.

Letter of Appointment

An appointment letter should be sent that contains—

- Information about the assignment.
- Details about orientation and training schedules.
- Details about the dress requirements or identification requirements.
- Pertinent logistical information (reporting time and place, parking, access to building).

Some volunteer assignments are not final until the results of screening, including reference checks and criminal or driving record checks, have been received by the unit. This point should be clearly communicated to the volunteer.

Unit Coordination Required During Placement

Even when a new volunteer has indicated a willingness to serve and a good match has been made, it is sometimes difficult for the individual to begin work immediately. It is especially important for units to coordinate orientation and training efforts in order to keep from losing new recruits. To prevent new volunteers from losing interest before they begin to work—

- Maintain contact with new volunteers during the orientation and training.
- Establish realistic starting dates.
- Reassure new volunteers that their services are welcome even though they may not immediately begin their volunteer assignment.
- Institute a formal unit-wide tracking system of new volunteers as they move through orientation and training.
- For positions with more intense training requirements, identify service-associated opportunities in which the volunteer can participate while completing training requirements.
- During the early period of a new volunteer's service, ask an established volunteer from the same service area to serve as a mentor.

Sometimes the original placement does not meet the needs of the volunteer or the placing department. In such cases, it is important that the volunteer be referred back to the volunteer administrator for a more appropriate placement. Referral back to the volunteer administrator should also occur if the placing department cannot provide service-related work within a reasonable period of time.

Placement Tracking

Accurate tracking of volunteer placement is strongly recommended for all units. Good volunteers can be "lost" or discouraged in the period between completing orientation and/or training and their actual placement. The volunteer administration office and the placing department need to communicate about and coordinate the volunteer's placement. See Attachment 11.1 for a sample placement tracking form.

How is Your Unit Doing?

Use the following questions to measure the effectiveness of your unit's placement procedures. The more positive answers you have, the better you are doing.

□ Yes □ No Do we send timely and informative letters of welcome to new volunteers?

□ Yes □ No As a unit, do we coordinate the orientation and training schedules so we do not lose new volunteers?

□ Yes □ No Do we have a tracking system that informs us when a volunteer has been placed by a department?

Sample Placement Tracking Form

Name of Volunteer: ______________________________

Telephone Number: ______________________________

Date Referred:	Referred to Department: Contact:	Preferred Position:	Comments:

Please complete the section below and return to the volunteer administration office within 10 working days of the referral date. This form should be returned by ____________________.

Date Placed:	Position:	Supervisor:	Comments:
Projected Date to Start Work:			

If you are unable to place the volunteer within 10 working days, please notify the volunteer administration office.

SECTION TWELVE: ORIENTING VOLUNTEERS

Orientation should meet the needs of the organization as well as the needs and expectations of the volunteer. The type and intensity of the volunteer's placement will influence the kind and amount of orientation he or she should receive.

Orientation as a Recruitment Tool

Some people want to know more about the Red Cross before they apply to become a volunteer. Inviting potential volunteers to a general orientation is an excellent way to provide them with more information. Such orientations are helpful when responding to the interest of large numbers of potential volunteers (for example, after a project in which many groups of volunteers participated in a one-time activity or following a disaster or other emergency in which large numbers of spontaneous volunteers responded).

Types of Orientation

Participation in orientation should not be a barrier to volunteer service. While the traditional group orientation may be preferred, it is not always convenient for the volunteer or practical for the unit. Units are encouraged to develop alternative ways to orient volunteers, such as individual orientations, self-study workbooks, videotapes, or on-line presentations.

Units are encouraged to establish an Orientation Committee to coordinate orientation activities for the entire unit. This committee should design and recommend a variety of orientation programs and identify the financial and staff resources required to carry them out. Coordinated by the volunteer administration office, the committee's membership should include representatives from the lines of services and support areas.

Three areas of basic orientation are recommended for the registered volunteer:

- Orientation to the International Red Cross Movement, American Red Cross and unit
- Orientation to the service and/or program
- Orientation to the specific job

General Orientation

The general orientation should be conducted before volunteers begin service. Although general orientation sessions should be scheduled, the unit needs to be flexible in delivering the information. Some training courses incorporate an orientation to the International Red Cross movement, the American Red Cross, or the service. Orientation elements specific to the unit, including local policies and procedures, could be provided to a volunteer separately.

For episodic and spontaneous volunteers, an abbreviated orientation, which can be accomplished with a single-page handout or as part of the orientation to the task, may be more appropriate.

The general orientation should include a careful review of the unit's policies concerning volunteers. Volunteer handbooks should also be distributed at this time. Each registered volunteer must sign the Code of Conduct certification at the start of his or her affiliation with the Red Cross. The general orientation is an excellent time for the Code of Conduct to be introduced and the certification signed.

The following materials are available for use in general orientation programs. Materials may be used as written or modified to meet the needs of specific groups:

- *You're in Good Company: American Red Cross Orientation* (ARC 2671)
- *You're in Good Company: American Red Cross Orientation Video* (ARC 2671V)

Orientation to the Service and the Job

Orientation to the service and the job is the responsibility of the service or department in which the volunteer will be working. The volunteer administrator is responsible for ensuring that orientations are available to volunteers, and for supporting and consulting with departments in planning service and job orientations.

Service orientations should cover the—

- Mission and goals of the service and their relationship to the unit and the corporate goals and mission.
- Service's policies and procedures.
- Knowledge essential to carry out service responsibilities.
- Value the service provides to the community.
- Service's relationships with other parts of the organization, community groups, and other organizations.

Job orientations should describe the—

- Specific responsibilities, expectations, and benefits of the job.
- Level of authority and accountability involved.
- Tools and resources available.
- Supervisor(s), peers, staff to be supervised, and support system.
- Methods of reporting and communicating.
- Safety responsibilities and accident reporting procedures.
- System of performance appraisal, and job and career development opportunities.
- Volunteer policies and procedures, including dispute resolution procedures.

Special job orientation opportunities are available for chapter board members and chapter chairs. An annual orientation is recommended for all chapter boards. The Building Chapter Leadership Teams training program is recommended for all chapter chairs and managers; this program is coordinated through the regional chapter services offices.

The volunteer administrator should track which new volunteers participate in a general orientation, and record that information in the individual's file.

How is Your Unit Doing?

Use the following questions to measure the effectiveness of your unit's orientation process. The more positive answers you have, the better you are doing.

- ☐ Yes ☐ No Has the responsibility of coordinating a unit-wide formal orientation program been assigned?
- ☐ Yes ☐ No Do all volunteers receive an initial orientation before beginning service?
- ☐ Yes ☐ No Have we identified ways to effectively inform all volunteers about changes and new issues in the Red Cross?
- ☐ Yes ☐ No Do we provide an annual formal orientation for chapter board members and chairs?
- ☐ Yes ☐ No Do we review the unit's policies and procedures with each new volunteer?

SECTION THIRTEEN: TRAINING VOLUNTEERS

Training covers the skills, knowledge, and attitudes necessary to enhance a volunteer's current position or to groom the volunteer for future positions within the Red Cross. Training is not a "one-shot" event. It is formal and informal, direct and integrated with other activities, and individualized and group-conducted. A good supervisor takes advantage of "teachable moments" as one of the best methods for training staff.

Access to most training in the Red Cross is based on the person's job function or role, not on whether he or she is a paid or volunteer staff member. Volunteers and supervisors share responsibility for volunteers' access to and participation in training activities.

Types of Training

General Red Cross training is appropriate for all volunteers regardless of their position, line of service, or level of service. Following are examples of general training courses—

- International Humanitarian Law
- First Aid and CPR
- Paid and Volunteer Staff Relationships
- Serving the Diverse Community

Service-specific or technical training is provided by each line of service and some support areas. Job placement usually depends on successful completion of this type of training. Examples of service-specific or technical training include disaster courses, First Aid/CPR, and Chapter Environment Resource System (CHERS) training.

Red Cross leadership and supervisory training is generally available only to governance, management, or supervisory volunteers or to those who, through a career development plan, aspire to these positions. Examples of leadership and supervisory training include the following courses:

- Leadership 21
- Building Chapter Leadership Teams
- FrontLine Leadership
- Supervision in Disaster

Training Development Resources

The training's purpose, target audience, and risk factors determine how formal the training design is and which segment of the organization is responsible for developing the course.

National Sector

All MUST and SHOULD and some of the MAY services have prescribed training, developed by the national sector, for anyone performing the key direct service functions. The national sector and local units collaborate in sponsoring these courses and, through a regularly published national training calendar, invite other units to participate.

Training resulting in authorization or certification is developed by the national sector, and any deviation from the training procedures not described in the instructor manual requires the approval of the national sector department that developed the training. Only authorized instructors may provide this type of training.

Local Units

Units design training to meet specific local needs and local community service programs. Local units also share and adapt materials developed by other units.

External to the Red Cross

Excellent training is available from organizations outside of the Red Cross, including professional organizations, colleges and universities, and other nonprofits. The volunteer administration office, in coordination with the department responsible for training, should develop networks with local trainers.

Training Approaches

As the volunteer population has changed, training methods have been adapted to meet the availability, learning styles, and expectations of these new volunteers. Among the vehicles for training Red Cross volunteers are—

- On-the-job training.
- Classroom instruction.
- Self-paced training modules using textbooks, tapes, and videos.
- Coaching and mentoring.
- Interactive teleconferences or satellite-broadcast seminars.
- Computer based training (CBT's).
- Meetings, workshops, and conferences.

Job coaching, one of the most effective informal training methods, is encouraged to supplement all other training methods. An effective supervisor assumes the role of job coach by—

- Seeing the volunteer doing something well and complimenting him or her.
- Demonstrating a skill or technique on the job.

- Sharing current techniques and new information.
- Encouraging teamwork, group-sharing, problem-solving, buddy systems, and mentoring.

Training Administration

Maintaining training records for each volunteer is important in establishing training plans for the unit and in career development planning for the volunteer. The volunteer administrator works with all supervisors of volunteers to develop a centralized system for training record keeping. Regardless of whether the record keeping is manual or electronic, each volunteer's file should include all training received through the Red Cross.

Generally, service-related courses for the MUST services, such as International Humanitarian Law, Disaster Services, and Armed Forces Emergency Services, are provided at no cost to the volunteer. Some training courses may be provided on a cost-recovery basis, such as health and safety instructor training. Letting volunteers know how training costs are funded is an excellent way to help them understand the unit's funding needs and how those needs are met.

Providing scholarships is an excellent way to encourage a volunteer workforce that reflects the economic diversity of the community. The volunteer administrator should provide leadership in working with all departments to ensure that adequate funds are available and budgeted for service-specific training.

The volunteer administration office is responsible for—

- Making available a variety of general training opportunities.
- Working with the unit's leadership to determine what training should be required or recommended for all volunteers in the unit.
- Developing an annual plan for training.
- Planning for training to accommodate a large influx of spontaneous volunteers.
- Ensuring that training classes are scheduled at times and places convenient to volunteers.
- Notifying volunteers of general training opportunities on a regular basis.
- Aggressively seeking funds for training and scholarships.
- Maintaining record-keeping systems for tracking volunteer training.
- Working closely with supervisors of volunteers to ensure that training is not a barrier to volunteer involvement.

How is Your Unit Doing?

Use the following questions to measure your unit's volunteer training success. The more positive answers you have, the better you are doing.

□ Yes □ No Have we clearly identified the skills and training required to effectively perform each volunteer job?

- ☐ Yes ☐ No Do we assess training needs on an annual basis?
- ☐ Yes ☐ No Have we identified the financial requirements to provide training?
- ☐ Yes ☐ No Have we budgeted for training, including scholarships for volunteers?
- ☐ Yes ☐ No Do we have an annual unit-wide training plan and calendar?
- ☐ Yes ☐ No Do we use national and local training resources?
- ☐ Yes ☐ No Do we promote training opportunities to volunteers?
- ☐ Yes ☐ No Are volunteers involved in planning for their ongoing training?
- ☐ Yes ☐ No Do we support job coaching and other informal training methods?

SECTION FOURTEEN: SUPERVISING AND EVALUATING VOLUNTEERS

The volunteer administrator is responsible for providing guidance and support to staff who supervise volunteers. Individuals, whether paid or volunteer, who supervise volunteers need to have good supervisory skills, including the ability to—

- Give constructive feedback and take corrective action.
- Delegate responsibilities and authority effectively.
- Communicate ideas effectively.
- Get good information from others.
- Recognize and acknowledge positive results.
- Develop job skills.
- Establish performance expectations.

It is important to keep in mind two differences between the supervision of volunteer staff and paid staff:

- Volunteers have the right to accept or reject an assignment and should be given the opportunity to do so in a nonpressured manner. Once a volunteer agrees to an assignment and the job has been clearly defined, the volunteer is expected to successfully complete the assignment.
- Because volunteers' schedules vary greatly, supervisors need to develop methods to keep volunteers informed of any changes.

Performance Feedback

Every Red Cross staff member has the right to know what is expected of him or her. Staff need feedback on their job performance, and the supervisor and organization need feedback on their effectiveness in providing the necessary support and coordination. An effective evaluation system provides this feedback to staff members, supervisors, and the organization.

An effective evaluation system ties each staff member's job to the goals and objectives of the department. Each job should focus on moving the department—and ultimately the organization—toward its goals. If any job does not tie into the department's goals, the job should be re-evaluated.

Formal feedback should assess how the volunteer is meeting key responsibilities, performance factors, and relevant work-related behaviors. A discussion of development plans for the volunteer's current position and of future career development should also be included. Formal feedback should be scheduled for volunteers at regular intervals, for example, within 90 days after initial placement, and on an annual basis thereafter. Many units use feedback forms, which both parties fill out before the meeting. See Attachments 14.1 and 14.2 for examples adapted from materials developed by the Greater Kansas City Chapter.

Role of Volunteer Administrator

The volunteer administration office usually provides overall coordination of the performance management system with volunteers. Individual supervisors conduct the evaluations. The volunteer administrator's role in the system is to—

- Establish annual time lines for conducting formal performance evaluations.
- Identify which volunteer positions should be included in the performance feedback process.
- Provide guidance to supervisors about the evaluation system.
- Keep centralized records on volunteer evaluations for at least five years.

Performance Problems and Termination

Paid and volunteer staff should be held to the same standards of behavior. Termination of volunteers or corrective discipline may be appropriate and necessary. Policies on corrective discipline and termination should be included as part of the volunteer handbook.

Corrective discipline usually is a three-step process including verbal warning, written warning, and termination. The unit's policies should detail what circumstances may lead to immediate dismissal. Each of the three steps requires documentation and coordination with the volunteer administrator.

In a case that calls for immediate dismissal, the situation may become confrontational. The unit representative can best explain why the termination is necessary by handling the release firmly and objectively. It is recommended that a third person be present for a dismissal meeting. In the event that a volunteer is notified of termination by letter, the unit should present the reasons and supporting information in clear, nonjudgmental statements.

The state coordinating chapter, state lead units for human resources, and the National Office of Volunteers are all resources that units may contact if they are faced with a difficult termination situation.

Disputes and Grievances

A dispute is defined as a grievance of a paid or volunteer staff member concerning any condition of employment or service, or the application of policies or procedures as they affect the work of the paid or volunteer staff. Disputes should be resolved at the organizational level that is as close as possible to the origin of the dispute. The *Board of Governors Policy Manual*, Part Two, Section 3.1.4, details the following requirements for the dispute resolution process:

- All units shall adopt and implement a formal process for the resolution of disputes raised by individual paid and volunteer staff members. The process shall allow for the prompt, complete, and impartial resolution of disputes.
- The dispute resolution process shall be based on the fundamental values of respect for the individual and fairness to all affected parties.
- The procedures shall be written in clear and concise language and shall be readily available for inspection and review by all paid and volunteer staff.
- At a minimum, the process shall identify the authority and sequence of decisions to handle disputes, the steps to be taken by all involved parties, the associated time frames for each step, and the information needed to initiate and proceed through the resolution process.
- Disputes between individuals from different Red Cross units (for example, chapters and a Blood Services region) shall be resolved jointly by the appropriate authorities within such units.
- With due regard to confidentiality concerns, disclosure of dispute information shall be limited to those who have a need to know.
- While it is the practice of the American Red Cross to provide equal opportunities for all its paid and volunteer staff, its obligations under employment laws apply to its employees, but not to its volunteers.

Exit Interviews

When volunteers leave the unit for any reason, supervisors should ensure that an exit interview is conducted. The information obtained at this time can be very beneficial for the unit in evaluating volunteer management practices.

How is Your Unit Doing?

Use the following questions to measure the effectiveness of your unit's supervision and evaluation of volunteers. The more positive answers you have, the better you are doing.

□ Yes □ No	Have supervisors of volunteers received training in effective supervision?
□ Yes □ No	Do we have ongoing mechanisms, including evaluation systems, for providing and obtaining feedback from volunteers?
□ Yes □ No	Are all volunteers given exit interviews when they leave the unit?
□ Yes □ No	Do we have a dispute resolution or grievance policy?
□ Yes □ No	Have we delineated those actions that can be cause for immediate dismissal?
□ Yes □ No	Are volunteers informed of those actions during the orientation process?
□ Yes □ No	Have we clarified the role of the volunteer administrator in the evaluation and dispute resolution process?

SUPERVISOR'S FEEDBACK FORM

These discussion questions will help the supervisor of volunteers determine the appropriateness of current placement and/or changes that might help to improve the volunteer's career development and/or self-motivation. This form should be used in conjunction with the *Volunteer's Feedback Form*.

VOLUNTEER: ______________________________ DATE: ______________

JOB TITLE: ______________________________ SUPERVISOR: ______________________

Please give feedback in the following areas (consider quality of work, customer service, job knowledge and/or technical skills, interpersonal skills, job-related behaviors and career development):

1. Strengths and special accomplishments of the volunteer in this position:

2. Development needs for the volunteer in this position:

3. Does this position match the strengths of the volunteer? Why? Why not?

4. Would you recommend assignment of this volunteer to a different type of position? (Possible recommendations include more or less responsibility; and more or less public contact). If reassignment is recommended, what position would be appropriate?

Attachment 14.2

VOLUNTEER'S FEEDBACK FORM

These discussion questions are designed to encourage the volunteer to give valuable feedback on her or his volunteer work experience in order to assist the Red Cross efforts to improve its volunteer program. It is designed to be used in conjunction with the *Supervisor's Feedback Form.*

VOLUNTEER: ____________________ DATE: ____________

JOB TITLE: ____________________ SUPERVISOR: ________________

1. What do you like best about your volunteer work? What is most rewarding?

2. What do you like least about your volunteer work? What is most frustrating?

3. How effectively are your abilities, skills, and interests being used?
   _____Very effectively _____Effectively _____Not effectively _____Don't know

4. Have you received the necessary training and instruction in order to be effective in your current position?
   _____Yes _____No _____Somewhat _____Don't know

5. Do you feel your work is important and appreciated?
   _____Yes _____No _____Somewhat _____Don't know

6. Have we responded adequately to your suggestions and concerns as a volunteer?
   _____Yes _____No _____Somewhat _____Don't know

7. Are you willing to continue in your current volunteer position?
   _____Yes _____No _____Maybe _____Don't know

8. Are you interested in expanding your volunteer opportunities?
   _____Yes _____No _____Maybe _____Don't know

9. What can we do to improve your Red Cross experience?

Other comments or concerns:

SECTION FIFTEEN: KEEPING EFFICIENT RECORDS

Record-keeping procedures and requirements for volunteer administration should be developed by the volunteer administrator and unit leadership. These procedures should includes methods of gathering needed information, maintaining information and obtaining information, including authorization for access. Record-keeping requirements and needs vary from unit to unit. At a minimum, the record-keeping system should include the following:

- Volunteer files
- General administrative files, including appropriate Red Cross documents
- Resource files

Volunteer Files

A volunteer file should be established and maintained for each individual volunteer (including registered volunteers and registered-for-credit volunteers) and for volunteer groups (unregistered volunteers). These files should be—

- Secured in a locked file cabinet and/or in secure computer databases.
- Current and accurate.
- Confidential. Information about an individual volunteer can be shared only with those individuals who need it to perform Red Cross responsibilities. Each volunteer should be able to review his or her own file on request. Volunteers should be encouraged to maintain copies of any documents provided to them.

It is recommended that the volunteer file contain at least—

- The volunteer application, including the waiver to verify information.
- Job descriptions of work performed by the volunteer.
- Any screening records, including reference and background checks.
- The appointment and/or reappointment letter.

Files for volunteer groups (unregistered volunteers) should contain—

- Group affiliation and organizational information.
- The contact's name, address, and phone number.
- Previous projects and assignments.
- Skills or expertise typically held by members of the group.

The following additional information should be included in the volunteer file, as applicable:

- Record of interviews.
- Letters of commendation and copies of certificates, awards, and nominations.
- Performance review forms with current position description attached.
- Recommendations for positions of greater responsibility.
- Training records.
- Documentation of any work performance problems.

Record-Keeping Requirements

For national reporting purposes, records must be maintained to satisfy the following requirements:

- *Annual Statistical Report and Instructions for Red Cross Chapters and Stations* (ARC 6546)
- Financial Accounting Standard #116

To meet national reporting requirements for the *Annual Statistical Report and Instructions for Red Cross Chapters and Stations*, at least the following information should be maintained on all volunteers within a unit:

- Number of volunteers by category who have given service during the past year:
  —Registered; a file is established and an individual record is maintained.
  —Registered for credit; a file is established and an individual record is maintained.
  —Unregistered; a file is established for a group and a summary record is maintained for all volunteers participating in the group.
- Age ranges of volunteers who are registered, registered for credit, and unregistered:
  —18 and under
  —19 to 24
  —25 and over
- Ethnicity (as described by the U.S. Census Bureau) for registered and unregistered volunteers:
  —White (not of Hispanic origin)
  —Black (not of Hispanic origin)
  —Hispanic
  —Asian or Pacific Islander
  —American Indian or Alaska Native
- Volunteer nurses
  —Registered nurses
  —Licensed practical and vocational nurses
  —Student nurses
- Total hours worked (for military station volunteers)

When soliciting age or ethnicity information, units are advised to —

- Solicit ethnicity and age information on a form separate from the volunteer application.
- State clearly why the information is being collected.
- Indicate that providing the information is voluntary and will not affect placement as a Red Cross volunteer except in cases for which there are minimum age requirements.
- Reassure the applicant that this information, as well as all other information, is confidential.

Units operating on an accrual basis must assign a dollar value to the time given by some volunteers, as outlined in Financial Accounting Standard #116. These volunteers include those who both—

- Provide service that creates or enhances nonfinancial assets of the unit (such as inventory, land, building, and equipment), AND
- Perform a service that they are licensed to perform, and that the unit would typically purchase if it were not donated.

Records of hours worked must be maintained on these volunteers. Attachment 15.1 helps in identifying when the hours must be reported. The volunteer administrator should work closely with the finance director to meet the requirements of this standard.

Record-retention guidelines are found in the *Financial Manual of Policy and Procedures* (FMPP) (ARC 4500), Appendix B, "Other Authoritative Financial Documents." The guidelines recommend that volunteer files be maintained for at least five years.

Record-Keeping Tools

The unit should determine which standardized forms to use for capturing volunteer information. Some forms available through GSD include the *Volunteer Personnel and Transfer Record* (Form 5524) and the *Volunteer Time Record* (Form 1924A)

Volunteer Personnel and Transfer Record (Form 5524) can be used for all volunteers as a permanent record and is transferred when the volunteer moves to another Red Cross unit. The Chapter Environment Resource System (CHERS) database provides data fields for the same information.

Volunteer Time Record (Form 1924A) can be used to record the actual hours worked or to indicate that a volunteer worked on a particular day without showing a specific number of hours. Whether or not specific hours are recorded for the time volunteers work is a decided upon by the local unit. In making this decision, units may want to consider that—

- Hours of service given by volunteers can be used to assign a financial value to the time given by volunteers, which is valuable information for internal planning and external fund raising.

- Hours provide measurable indicators of change in the amount of service being given by volunteers.

Units with large numbers of volunteers often computerize their record keeping. Keeping automated records can ease storage and retrieval of volunteer information and provide consolidated reports for the unit as a whole or specific departments.

When units computerize their volunteer records, they are encouraged to use CHERS which has been custom-designed for Red Cross record keeping and reporting. CHERS includes a comprehensive volunteer information module that tracks information for national reporting requirements, as well as flexible fields and codes that can be modified for the unit's needs. CHERS is also designed to provide mailing labels, required statistical reports, and individually designed reports.

Active and Inactive Volunteer Files

Files for volunteers who are currently active should be separated from those of inactive volunteers. Red Cross volunteers are considered active as long as they are giving service at least once each fiscal year. For annual statistical reporting purposes, all volunteers who have been active during the fiscal year, regardless of their status at the end of the fiscal year, should be counted as a volunteer during that year.

Because volunteers sometimes become inactive without formal notice of their intention to end their volunteer service, units are encouraged to conduct an annual review of their active volunteer files and identify volunteers who have not given service within the last fiscal year. It is then important to follow up with these volunteers to verify that they have ended their service and, if they have, to identify the reasons they have done so.

Files on inactive volunteers can be important resources for—

- References—The Red Cross may be asked to provide reference information on a former volunteer to an employer or another Red Cross unit. (The unit should be certain, however, to obtain a copy of the release signed by the volunteer before giving references.)
- Monitoring of volunteer trends—Reviewing the reasons for turnover and inactivity can make it possible to identify and address key issues.

Transfer of Volunteer Records

The person responsible for maintaining volunteer records is also responsible for transferring and receiving records when an individual moves from one Red Cross unit to another. When a volunteer transfers to a new jurisdiction, the transferring unit should prepare the following:

- Form 5524 or the CHERS volunteer profile with comments and updated information. The original of the form or report should be given to the volunteer to take with him or her to the new Red Cross unit.
- A photocopy of Form 5524 or the CHERS volunteer profile to be retained in the file of the transferring volunteer.
- A Transfer of Records memorandum to be sent to the receiving unit with Form 5524 or the CHERS volunteer profile attached. See Attachment 15.2 for a sample Transfer of Records memorandum.

Note: If the volunteer is associated with the military, the full name, grade, and serial number of the volunteer, along with the name of the volunteer's spouse or parents, the military organization, and the probable dates of arrival should be included in the transfer memorandum.

When a volunteer transfers to your unit—

- Ask the volunteer for Form 5524 or the CHERS volunteer profile. If the volunteer does not bring his or her records, request that he or she obtain them from the former unit.
- Check with the former unit to be sure that the volunteer is in good standing and has a satisfactory work performance standing.
- Ensure that all records, including those maintained by national headquarters, are updated beyond the unit with the volunteer's new address, telephone number, place of employment, and other relevant information.

Certain Red Cross certifications and authorizations require specific procedures for transfer of records. Information about the transfer of certification for health and safety services instructor status is available in the *Manual of Administrative Policies and Procedures*, ARC 3530, Section III.X. The process for transfer of membership in the Disaster Services Human Resources system is described in *Disaster Services Human Resources System Management*, ARC 3052, Section VI.F.

Red Cross units may transfer to other Red Cross units information and records on a volunteer without a release or consent from the volunteer.

Volunteer Responsibility in Record Keeping

Volunteers are encouraged to maintain their own records separate from those maintained by the Red Cross unit. The Red Cross maintains no central database of volunteer records. Volunteers serving in more than one unit must accept responsibility for the transfer of records information from one unit to another.

How is Your Unit Doing?

Use the following questions to measure the effectiveness of your unit's record keeping. The more positive answers you have, the better you are doing.

- □ Yes □ No Has your unit identified which volunteer administration records should be maintained?
- □ Yes □ No Does your unit have a volunteer file for each registered and registered-for-credit volunteer?
- □ Yes □ No Are volunteer files maintained in a secure and confidential manner?
- □ Yes □ No Is information required on the *Annual Statistical Report for Red Cross Chapters and Stations* available and easily compiled?

RECORDING THE VALUE OF PROFESSIONAL SERVICES PROVIDED BY VOLUNTEERS

SERVICE PROVIDER	RECORDING REQUIRED IF ALL QUESTIONS HAVE A *YES* ANSWER			SHOULD THE VALUE OF VOLUNTEER HOURS BE RECORDED?
	IS VOLUNTEER A LICENSED PROFESSIONAL?	IS VOLUNTEER DOING WHAT S/HE IS LICENSED TO DO?	WOULD THE UNIT TYPICALLY PAY FOR THESE SERVICES? **OR** DO THE SERVICES ENHANCE NONFINANCIAL ASSETS ?	
Nurse providing disaster health services in a disaster shelter	YES	YES	NO, have never paid for this service.	NO
Nurse working on a bloodmobile	YES	YES	YES, an R.N. is required for this service.	YES
Nurse working as a caseworker	YES	NO	NO, the nurse is not doing what licensed to do AND the Red Cross would not typically pay for this service.	NO
Emergency Medical Technician teaching Health and Safety Services classes	YES	NO	SOMETIMES instructors are paid to teach contract courses, but licensing is not a prerequisite.	NO
Certified Public Accountant (CPA) who audits *Annual Chapter Financial Statements* for an accrual-basis chapter	YES	YES	YES, a licensed professional is required for this service, and the chapter would be required to pay if the service were not donated (service not valued at "busy season" rates).	YES
Certified Public Accountant (CPA) prepares *Annual Chapter Financial Statements* for a cash-basis chapter	YES	YES	NO, cash-basis chapters are not required to report professional service hours, nor does the level of service require a CPA.	NO
Attorney who performs legal work for the chapter	YES	YES	YES, an attorney would be paid by the chapter if the services were not donated.	YES
Attorney who serves on the board, or gives an opinion at a board meeting	YES	NO	NO, this individual is serving as a board member and is not acting in a licensed capacity.	NO
Architect who provides plans for a building expansion; contractors who perform major renovation work	YES	YES	YES, a nonfinancial asset will be enhanced. YES, an architect or contractor would be paid if the services were not donated.	YES
Licensed caterers who provide their services for a special event	YES	YES	YES, caterers would be paid if the services were not donated.	YES

Note: This is a sample list only. It does not represent all possibilities for licensed, professional volunteer services. If you have questions, please refer to *Financial Manual of Policy and Procedures* (ARC 4500), Section 6.7. "Implementation of Standards of Financial Accounting Nos. 116 and 117" (ARC 4500V).

Sample: Transfer of Records Memorandum

National Headquarter

American Red Cross

To: *Name of Volunteer's New Unit* **Date:**

From: *Name of Volunteer's Former Unit* **Subject:** Transfer of Records for *Name of Volunteer*

Please find attached a copy of the *Volunteer Personnel and Transfer Record* (ARC 5524)

for ______________________________
Name of Volunteer

who served at the ______________________________
Name of Red Cross Unit

from ____________________ to ____________________.
Month/Year Month/Year

Comments:

____
Signature

____
American Red Cross Unit

____
Title

____
Address

____
Telephone

SECTION SIXTEEN: RECOGNIZING VOLUNTEERS

Recognition is respect made visible. To be effective, recognition should be—

- Provided to all volunteers.
- Personalized and flexible.
- Ongoing and constantly evaluated.
- A responsibility of the entire unit.

Relationship of Recognition to Individual Motivation

The most meaningful recognition varies with the motivation of the individual volunteer. If a volunteer is motivated by being with people and establishing warm relationships, recognition could include—

- Opportunities for team interaction.
- Award or certificate presentations in front of peers.
- Praise from peers and supervisors.
- Recognition events in a social setting.

If the volunteer is motivated by achieving goals, completing assignments, mastering tasks, and solving problems, recognition could include—

- Increased responsibility.
- New, more challenging assignments.
- Promotion to a new position.
- Awards or certificates recognizing specific achievements.
- Naming a new technique or process after the volunteer who designed it.

If the volunteer is motivated by being able to influence others, recognition could include—

- The opportunity to train or supervise others.
- A leadership position.
- A note or telephone call from the unit's leadership.
- A request for advice or counsel, and participation in both formal and informal decision making.

Recognition at Your Unit

Each unit should develop a recognition plan and procedures for carrying out that plan. The appointment of a Recognition Committee is suggested to develop procedures and recommend policies for local recognition. The volunteer administration office, with the support of the unit's management and governance leaders, is responsible for ensuring that all Red Cross volunteers receive timely formal and informal recognition.

The local procedures should include a system for nominating local volunteers for national awards. In addition, local units may establish their own awards. Units should also plan for nominating Red Cross volunteers for community awards given by other organizations. By nominating volunteers for external awards, both the volunteer and the Red Cross are recognized.

For selection and presentation of formal recognition, more consistency of criteria and standard procedures are required. A key responsibility of the Recognition Committee is to establish fair and flexible criteria for formal recognition of all volunteers. Commitment, quality of work, years of service, and hours of service are among the criteria used to determine whether formal recognition is warranted. Whatever criteria are used for recognition, formal recognition should be consistent and equitable for all volunteers. Establishing and monitoring systems for selecting nominees for community and national awards are also a responsibility of the Recognition Committee.

Recognition Events

Recognition events are an annual tradition in many units. The events range from formal dinners to picnics and games. Because it is difficult to identify an event that is attractive for all volunteers, smaller special events can be conducted in place of, or in addition to, the annual unit-wide recognition event.

Especially for episodic or spontaneous volunteers, it is important that an event be held close to the time of the volunteer activity. Recognition events for episodic volunteers should be adapted to their level of involvement. A simple thank-you card distributed at the end of the event can be appropriate and is a timely way to recognize volunteers.

All recognition plans should be evaluated periodically and changed accordingly. Recognition events, certificates, pins, and letters of appreciation are only outward signs of recognition and can become meaningless when they are the only form of recognition given to volunteers.

National Awards and Recognition System

The National Awards and Recognition Committee provides leadership and direction on national criteria, systems, and procedures that affect the recognition of individuals, groups, and organizations that are involved in fulfilling the mission of the Red Cross.

National awards are presented at the Red Cross annual convention. Some of these awards also recognize paid staff. See Attachment 16.1 for a summary of these awards. Every year, units are advised of the deadlines and any changes in the awards or selection process by a letter from the

Red Cross chairman. In addition to the national awards given on an annual basis, other volunteer honor and service awards have been established. See Attachment 16.2 for a description of these awards.

How is Your Unit Doing?

Use the questions to measure the effectiveness of your unit's recognition system. The more positive answers you have, the better you are doing.

- ☐ Yes ☐ No Have we designed and agreed upon a unit-wide volunteer recognition plan?
- ☐ Yes ☐ No Have we scheduled both formal and informal events?
- ☐ Yes ☐ No Is our recognition plan tailored to respond to different motivational needs?
- ☐ Yes ☐ No Does our annual plan recognize the contributions of **all** of the unit's volunteers?
- ☐ Yes ☐ No Do we have an active Recognition Committee?
- ☐ Yes ☐ No Have we established fair and flexible criteria for recognition?
- ☐ Yes ☐ No Have we tapped into the Red Cross awards and recognition resources?
- ☐ Yes ☐ No Do we initiate or participate in community-wide volunteer recognition events, especially during National Volunteer Week?
- ☐ Yes ☐ No Have we planned small, informal recognition activities to ensure that recognition is ongoing and not limited to one annual event?

American Red Cross National Awards

National Awards at a Glance

AWARD	Recognizes	Who Can Be Nominated	Nomination Criteria	Who Can Nominate
Harriman Award	Highest recognition for superior volunteer service	Any Red Cross volunteer	Extraordinary achievements	Any Red Cross unit
Tiffany Awards	Superior job performance	Employees with 2 or more years continuous employment	Consistently superior results	Any Red Cross volunteer or employee
Good Neighbor Award	Outside individual or organization for significant humanitarian contribution	Non Red Cross individual or organization	Demonstrated exceptional initiative in identifying and meeting a community need	Any community member or Red Cross volunteer or employee
Cynthia Wedel Award	Distinguished volunteer services performed at the local unit or beyond for a number of years	Any Red Cross volunteer	Superior and outstanding leadership service over several years	Any Red Cross unit
Partnership Award	Cooperative partnership work between employees & volunteers	Paid and volunteer partnership, or volunteers in partnership	Extraordinary team commitments, identifiable project that meets a need	Any Red Cross unit
Charles R. Drew Award	Outstanding contribution to Red Cross Biomedical Services	Two awards given: one to a volunteer & one to an employee	Outstanding contribution in strengthening & improving Biomedical Services	Any Red Cross unit
National Disaster Services Volunteer Award	Exceptional leadership in Disaster Services	Red Cross volunteers	Measurable impact, actions of merit to strengthen or enhance service delivery	Any Red Cross unit

AWARD	Recognizes	Who Can Be Nominated	Nomination Criteria	Who Can Nominate
Philos Award	Spirit of charitable giving	Individual, organization, foundation	Significant gift that motivated other contributions	Any Red Cross unit
Cultural Diversity Outreach Award	Excellence in outreach efforts by chairman & manager	Any Red Cross unit	Excellence in achieving reciprocity with local diverse groups	Any Red Cross unit
Volunteer Fund Raiser of the Year	Exceptional leadership in fund- raising efforts	Any Red Cross volunteer	Demonstrated success in meeting or exceeding fund-raising goals	Any Red Cross unit
International Humanitarian Service Award	Exemplifies humanitarian roles of human dignity, respect, compassion, protection, assistance	Any Red Cross or non-Red Cross individual, group, or organization	Exemplifies and inspires humanitarian roles implied in the fundamental principles of the International Red Cross	Any person, group
Samuel Gompers National Labor Award	Exemplary volunteer service by a labor union member or organization	Active or retired labor union members, labor union organization	Dedicated services that demonstrate leadership and further relationship with American Red Cross	Any Red Cross unit
Armed Forces Emergency Services Award	Outstanding contribution to strengthening Armed Forces Emergency Services	May be awarded to employees and volunteers	Innovative efforts in meeting needs of customers	Any Red Cross unit
Health and Safety Services Award	Exemplary commitment to Heath & Safety Services core values in expanding services	Red Cross volunteers or employees or authorized provider	Exceptional customer service, teamwork, and leadership	Any Red Cross unit
Ann Magnussen Award	Outstanding contribution to Red Cross nursing programs & services	Volunteer registered nurse	1 year Red Cross service with demonstrated exceptional effort, leadership, & results	Any community member or Red Cross volunteers or employees

AWARD	Recognizes	Who Can Be Nominated	Nomination Criteria	Who Can Nominate
Jane A. Delano Award	Exceptional leadership contributing to nursing programs and services	Paid or active reserve status registered nurse with 5 years of service	Outstanding contributions to Red Cross programs & services, advancing the involvement of nurses in Red Cross	Any community member or Red Cross volunteer or employee
George M. Elsey Award for Outstanding Involvement of Youth	Outstanding integration of youth involvement	Any Red Cross unit	Successful youth involvement resulting in exemplary service to the community	Any community member or Red Cross volunteer or employee
Woodrow Wilson Award for Exemplary Youth Volunteer Service	Significant volunteer service by youth	Youth under age 21 with 3 years consecutive service	Demonstrated accomplishment of exceptional merit, creativity, leadership	Any Red Cross unit
School and Community Award for Youth in Health & Safety	Improved health & safety practices	Schools, individual youth, youth groups, adult youth leaders	Developed specific activities that resulted in improved health & safety practices	Any Red Cross unit

Other Volunteer Honor and Service Awards

Award	Presented by	Other Information
Certificate of Merit is presented to an individual who saves or sustains a life as a direct result of Red Cross training.	NHQ Health & Safety Services	Nomination must be received within 1 year of the date of incident. *Certificate of Merit Nomination Form* (Form 5785) is available from GSD.
Florence Nightingale Award honors nurses and voluntary aides who have distinguished themselves by their exceptional courage and devotion to the wounded, sick, or disabled.	Nomination submitted to the International Committee of Red Cross. Presented by NHQ if the recipient is an American.	Information and nomination forms are distributed to the field when received from the ICRC.
International Certificate of Appreciation and **International Pin** recognize a Red Cross volunteer or employee for outstanding service on an international level.	NHQ International Services	Contact International Services at NHQ for more information.
Labor Participation Citation for Service recognizes support of and participation in Red Cross services by a labor union member or organization.	NHQ Labor Participation	A letter should be sent to the director of Labor Participation at NHQ recommending an individual or group for this award.
Clara Barton Volunteer Leadership Honor Award recognizes meritorious service in volunteer leadership positions held over a period of years.	Any unit	The *Clara Barton Award Certificate* (Cert 102) and Pin (320561) are available from GSD. The nomination form is available on CrossNet under Awards & Recognition.
Special Citation for Exceptional Volunteer Service recognizes volunteers who have demonstrated an exceptional interest in and responsibility for service on behalf of the Red Cross.	Any unit	The *Special Citation for Exceptional Volunteer Service Certificate* (Cert 711) and pin (320895) are available from GSD. The nomination form is available on CrossNet under Awards & Recognition.
Certificate of Recognition for Extraordinary Personal Action—Health & Safety Services This award recognizes individuals who save or sustain life by action that exemplifies the goals and objectives of the Red Cross.	Any unit	The *Certificate of Recognition for Extraordinary Personal Action* (Cert 1718) can be ordered from GSD.

SECTION SEVENTEEN: DEVELOPING VOLUNTEER CAREERS

Career planning is a responsibility shared between the individual and the organization. Individual volunteers have the primary responsibility for deciding on their career goals and how to achieve them. The organization's role is to create an environment that supports career development and provides resources to facilitate such development.

It should not be assumed that volunteers want to develop their careers only through promotions and upward mobility. Development also occurs when volunteers—

- Enrich the current position with additional responsibilities or opportunities.
- Move to other areas or levels of the Red Cross.
- Transfer to a new program area.

Supervisor's Role in Career Development

The supervisor plays a key role in helping staff to plan their growth and development. The supervisor can do this by—

- Discussing the normal career tracks associated with jobs.
- Developing a career path plan with each volunteer. See Attachment 17.1 for an example.
- Providing ongoing evaluations and conducting annual performance reviews.
- Making volunteers aware of training opportunities.
- Including volunteers in activities (such as special events, committees, and task forces) that encourage development of new skills and offer new experiences.
- Encouraging volunteers to be realistic in their career goals and to be assertive in developing their careers.
- Nominating volunteers for special assignments and career development opportunities.
- Helping volunteers gain access to key networks or individuals.

Volunteer Administrator's Role in Career Development

The volunteer administrator plays a major role in supporting the development of volunteers' careers by—

- Identifying and informing managers and supervisors about career development resources and opportunities.
- Encouraging volunteer performance appraisals, especially for all governance and management volunteers.
- Maintaining a list of available volunteer opportunities for all levels of the organization.

- Helping supervisors tailor development opportunities for individual volunteers and developing succession plans for key positions.
- Encouraging the unit to nominate volunteers for state, regional, and nationally elected and appointed positions.

Beyond-the-Unit Service

Many opportunities for service exist at the state, regional, and national levels. These opportunities are one method of promoting career development for volunteers. See Attachment 17.2 for examples of beyond-the-unit opportunities.

Service beyond the unit provides benefits to the individual volunteer, the unit, and the organization. A volunteer may benefit through—

- Professional or personal development.
- Volunteer career development.
- Networking opportunities.
- Increased commitment to the Red Cross.
- Opportunities to serve the broader community.

When a unit encourages its volunteers to give service beyond the unit, it not only experiences the increased motivation and involvement of that volunteer, it also receives direct benefits such as—

- Expanded volunteer expertise.
- New ideas from other units.
- Participation in organizational decision making.
- Representation of the local unit's issues and concerns.

The Red Cross relies on volunteers to provide governance, management, and direct service outside the local unit. Beyond-the-unit service enables the organization to—

- Remain volunteer-led and mission-focused.
- Fulfill its mission and the international principle related to its voluntary nature.
- Allow a diversity of perspectives and opinions.

At the leadership level, it is critical that volunteer potential be developed. To ensure that key leadership positions are filled by highly qualified volunteers, it is necessary to identify and develop an available pool of competent candidates. Units at all levels should develop a volunteer succession planning system. Such a system requires the involvement of all levels of the organization.

How is Your Unit Doing?

Use these questions to measure the effectiveness of your unit's career development for volunteers. The more positive answers you have, the better you are doing.

- ☐ Yes ☐ No Do supervisors of volunteers offer career development options?
- ☐ Yes ☐ No Are volunteers free to move to other departments or areas to broaden their career?
- ☐ Yes ☐ No Does our unit nominate volunteers for positions beyond the unit?

VOLUNTEER CAREER PATH PLAN

POSITION	SKILLS ACQUIRED	DEVELOP-MENTAL NEEDS	ACTION	DATES	OTHER GOALS
LAST POSITION					
CURRENT POSITION					
NEXT POSITION					
FUTURE POSITION					
FUTURE POSITION					

AMERICAN RED CROSS
BEYOND THE UNIT POSITIONS FOR VOLUNTEERS

POSITION	*RESPONSIBILITIES & LENGTH OF TERM*	*QUALIFICATIONS*	*METHOD OF APPOINTMENT/ELECTION*
	STATE LEVEL/CHAPTER SERVICES		
State Service Council Chair	Together with Vice Chair, provide leadership for the Council; sign state plans and funding authorizations on behalf of the SSC. Term: 3 years	ARC volunteer leadership and/or management experience.	Regional management team (RMT) makes appointment from among chapter volunteers other than the Coordinating Chapter.
State Service Council Members (15 members or more)	Develop state plan, disaster preparedness and response plan, assign state leadership roles and responsibilities to chapters, allocate funding, oversee coordinating chapter, ensure service delivery in areas not covered by chapters. Term: 3 years	ARC service delivery unit leadership experience. Experience relevant to task at hand.	Selected from the State Consortium through a nomination process: Chapters nominate candidates. SSC Chair and Vice Chair make appointment. (*Handbook of Corporate Governance and Board Policies*, ARC 575)
State Service Council Subcommittees, Task Forces, Committees, e.g.— Human Resources State Planning Cultural Diversity Disaster Planning Disaster Fund Raising Disaster Training Health & Safety AFES & International State & Federal Relations Conference Planning Financial Development Nominating Others as needed	Varies by task and by state. Term: varies by state	ARC service delivery unit leadership experience. Experience relevant to task at hand.	SSC Chair and Vice Chair make appointments.
	REGIONAL LEVEL/CHAPTER SERVICES		
Regional Chair	In partnership with Regional Executive Officer, provide leadership and regional management oversight. Term: 3 years	ARC service delivery unit volunteer. Extensive ARC experience and/or beyond- the-chapter experience.	Recommended by Regional Nominating Committee and appointed by joint action of Senior Vice President, Chapter Services and Chair, Chapter Services. (ARC 575)

POSITION	RESPONSIBILITIES & LENGTH OF TERM	QUALIFICATIONS	METHOD OF APPOINTMENT/ELECTION
REGIONAL LEVEL/CHAPTER SERVICES (Cont'd)			
Regional Committee Member (5 members)	Allocate NHQ financial resources, make rechartering recommendations to the BoG, oversee SSC operations planning, and chapter non-compliance intervention. Term: 3 years	ARC service delivery unit volunteer. Extensive leadership experience in and/or beyond the unit.	Recommended by the Regional Nominating Committee; appointed by joint action of Regional Executive Officer and Regional Chair. (ARC575)
Regional Awards & Recognition Chair	Serve as National Awards & Recognition Committee member and oversee Regional Awards & Recognition Committee. Term: 3 years	ARC service delivery unit volunteer with experience in awards, recognition, or other leadership activities.	Recommended by Regional Management Team and appointed by Chairman, National Awards & Recognition Committee.
Regional Awards & Recognition Committee (5 members)	Screen and select nominations, promote recognition within region. Term: 1 year, maximum 3 terms	ARC service delivery unit volunteer or paid staff.	Approved jointly by Regional Management Team and Regional Awards Chair.
Regional Nominating Committee Chair	Oversee Regional Nominating Committee functions. Term: 1 year	Not specified.	Appointed by Regional Chairman.
Regional Nominating Committee (4 members + Chair)	Review nominations for regional appointments and make recommendations. Term: 1 year	1 member is Regional Chairman; 4 others may not be members of Regional Committee.	Appointed by Regional Committee.
Regional Building Chapter Leadership Team (BCLT) Coordinator	Oversee BCLT training & scheduling in region. Term: 3 years	ARC chapter volunteer with board development/leadership experience.	Recommended by Regional Management Team and appointed by National BCLT Coordinator.
BCLT Facilitator Trainers (2) one paid & one vol staff member	Train facilitators as well as chapter leadership teams (chapter manager and board chair). Term: 3 years	Previous experience as BCLT Facilitator.	Regional Management Team and Regional BCLT Coordinator.
BCLT Facilitators - 4 to 5 teams (1 volunteer and 1 manager each)	Train chapter leadership teams (chapter manager and board chair). Term: varies	ARC chapter management and/or governance experience.	Regional Management Team and Regional BCLT Coordinator.
Ad hoc Regional Committee (i.e. Human Resources).	Varies by task. Term: varies by Region	Leadership experience in issues relative to committee work.	Regional Management Team.

POSITION	*RESPONSIBILITIES & LENGTH OF TERM*	*QUALIFICATIONS*	*METHOD OF APPOINTMENT/ELECTION*
AREA LEVEL/ BLOOD SERVICES			
Area Council of Chairs	Advise Corporate Management and Biomedical Services Board in financial, service delivery & regulatory compliance matters. Term: By virtue of position	All Chairs of BSR Boards - 1 per Region.	By virtue of their office.
NATIONAL LEVEL			
Board of Governors	Governance of ARC Corporation. Term: 3 years, maximum 2 terms	<u>For 30 members elected by delegates</u>: critical skills (including beyond-the-unit experience) identified in Blue letter each year. <u>For 12 members elected by Board:</u> critical skills established by Executive Committee of BoG. <u>For 8 members appointed by the President of the U.S.</u>: officials of departments and agencies of Federal Government; at least one and not more than three from Armed Forces.	<u>For members elected by delegates</u>: Blue letter solicits candidates for 10 positions/year; slate presented by National Committee on Nominations; elected at National Convention by delegates. <u>For members elected by BoG</u>: At-large Nominating Committee of BoG makes recommendations for Executive Committee; slate presented for BoG elections.
National Chairman of Volunteers	Executive Management Staff responsibilities; advocacy for volunteerism at all levels, National Office of Volunteers. Term: 1 year, maximum 3 terms	Extensive ARC leadership experience in service delivery and governance in broad variety of positions.	Blue letter to field soliciting applications; appointed by President & Chairman of ARC.
Biomedical Services Board (22 members, including Chairman of ARC) (Standing committee of BoG)	Delegated specific governance responsibilities for Biomedical Services (Blood Services & Plasma Operations, Tissue Services, Biomedical Research & Development). Term for Non-BoG members: 1 year, maximum 3 terms.	<u>For BoG members:</u> 12-18 members; Chairman of ARC. <u>For non-BoG members:</u> 3-9 members, at least 3 of whom must serve on local BSR Board/ Area Council of Chairs. Local ARC board experience, industry expertise.	BoG members recommended by Board Leadership Subcommittee to Executive Committee; Executive Committee recommends slate to BoG for election. Non-BoG members recommended by Biomed Board to Executive Committee; Executive Committee recommends to BoG for election.

POSITION	*RESPONSIBILITIES & LENGTH OF TERM*	*QUALIFICATIONS*	*METHOD OF APPOINTMENT/ELECTION*
	NATIONAL LEVEL (Cont.)		
National Committee on Nominations (16 elected members)	Review and recommend candidates for the Board of Governors, Committee on Resolutions, Committee on Nominations, Convention Officers, and other positions. Term: 2 years	ARC chartered unit leadership volunteer.	Blue letter solicits candidates; slate presented by National Committee on Nominations; elected at annual National Convention by delegates.
Committee on Resolutions (20 members)	Consider proposed resolutions from chartered units; present resolutions for vote at annual National Convention. Term: 1 year	ARC chartered unit volunteer.	Blue letter solicits candidates; slate presented by National Committee on Nominations; elected at annual National Convention by delegates.
Chairman of Convention	Preside at the plenary sessions of the national convention. Term: 1 year	Traditionally a leadership volunteer of the host chapter.	Blue letter solicits candidates; slate presented by National Committee on Nominations; elected at annual National Convention by delegates.
Vice Chairman of Convention	Perform the chairman's duties at the convention in the absence of the chairman. Term: 1 year	ARC leadership volunteer.	Blue letter solicits candidates; slate presented by National Committee on Nominations; elected at annual National Convention by delegates.
National Awards and Recognition Committee (up to 17 members including Chair.)	Provide leadership and direction on national criteria, systems, and procedures that impact the recognition of individuals, groups and organizations engaged in accomplishing the mission of the ARC. Term: 1 year, maximum 3 terms	ARC leadership volunteer. Selected from among the Chairs of the A&R Committees of the chapter regions, Biomedical Services areas & NHQ paid & volunteer staff.	Chair appointed by National Chairman of Volunteers. Members are appointed by National A&R Committee Chair.
Board of Trustees of the Life & Health Benefits Plan (6 volunteer members)	Oversight of the ARC insurance program and funding status. Term: 3 years; maximum 2 terms	1 - represents ARC retirees 1 - current member BoG HR Committee 2 - corporate insurance experts 5 - representatives of participating units (operational or HR mgmt experience)	Candidates recommended by current chair and VP, HR to BoG Executive Committee; Executive Committee recommends to BoG for election.

POSITION	RESPONSIBILITIES & LENGTH OF TERM	QUALIFICATIONS	METHOD OF APPOINTMENT/ELECTION
NATIONAL LEVEL (Cont.)			
Endowment Fund Board of Trustees (9 volunteer members)	Invest restricted endowment gifts. Term: 3 years, maximum 2 terms	Professional competence in investment markets; business leaders with strong ARC unit leadership background.	Members solicit chartered units & submit recommendations to Fund Board Chairman & VP, Finance; nominations submitted to Executive Committee, which makes recommendations to BoG for election.
Investment Committee (minimum of 6 members)	Recommend alterations to existing investment policy; advise BoG Finance Committee; manage Select Investment Program. Term: 3 years, maximum 2 terms	Members (4 minimum) of Endowment Fund Executive Committee; 1 member BoG Finance Committee; 1 chartered unit leadership volunteer.	Members of the Endowment Fund solicit chartered units; submit recommendations to Chair & VP, Finance; appointed by Chairman of Endowment Fund Board of Trustees.
Retiree Advisory Council (15 volunteer members)	Strengthen linkage between ARC and its retirees; advise BoG on policy, program & procedures affecting ARC retirees. Term: 3 years	6 elected retirees - 10 years of career service w/ARC; current activity in local community. 3 retirees as alternates 2 - BoG liaisons	Council submits slate to VP, HR; VP, HR makes appointments. Council submits slate to VP, HR; VP, HR makes appointments. BoG HR Chairman appoints with approval of Chairman of ARC.
Board of Trustees of the Retirement System (9 volunteer members)	Oversight of Retirement System, manage the System assets. Term: 3 years, maximum 2 terms	Administration Committee: HR, ARC and business experience. Finance Committee: investment & finance experience.	Slate recommended by Board through VP, HR to BoG Executive Committee; Executive Committee recommends to BoG for election.
History & Education Center Advisory Committee	Program planning, fundraising, programmatic oversight. Term: 3 years, maximum 2 terms	Up to 30% = members of Council of Former Governors; expertise in museum management, fundraising and grantsmanship; interest in creating and sustaining a museum complex. -- 2 Executive Committee members serve as liaisons to HEC Advisory Committee.	Currently under revision. Executive Committee members appointed by Chairman of ARC.
National Advisory Committee on Youth Involvement (15 members)	Advise and make recommendations to HR Committee of BoG and other leadership on issues involving youth and young adults. Term: 3 years	9 - ARC chartered unit youth and young adult volunteers 3 - adults (chap. mgrs, youth development specialist, marketing or fundraising expert) 3 - BoG liaisons	Youth and young adult nominations solicited by Blue Letter; selected by Committee on Nominations; elected by BoG HR Committee. Adult member recommendations solicited by Blue Letter; selected by Committee on Nominations; elected by BoG HR Committee. BoG liaisons appointed by BoG HR Committee Chair with approval of Chairman of ARC.

POSITION	RESPONSIBILITIES & LENGTH OF TERM	QUALIFICATIONS	METHOD OF APPOINTMENT/ELECTION
NATIONAL LEVEL (Cont.)			
NEO/Cultural Diversity Advisory Council (12 members)	Advise BoG and other leadership on matters related to institutionalization of minority involvement and cultural diversity in all segments of the organization. Term: 3 years	Expertise in EEO and/or diversity program management; representation from both ARC field and profession. BoG members may serve in ex-officio capacity; 3 serve as BoG liaisons.	Nominations are solicited from service delivery units by Council Nominating Committee comprised of outgoing Council members; slate is approved by Council and appointed by the Council Chairman.
National Nursing Committee (10 field volunteers, including Chair)	Provide support to all paid and volunteer nurses; support development & implementation of state networks for ARC nurses within existing ARC field structures. Term: 3 years	ARC chartered unit paid or volunteer nurse. 1 - BoG liaison	Appointed by National Chairman of Volunteers. Appointed by Chairman of ARC.
National Task Forces, Ad Hoc Work Groups, etc.	Varies with group Term: for duration of task or project.	ARC leadership in issues relative to tasks.	Varies by task force.
Senior Volunteer Advisor, Biomedical Services	Biomedical Services Senior Management position, advisor to SENIOR VICE PRESIDENT Biomedical Services. Term: 1 year, maximum 3 terms	BSR and leadership experience.	Appointed by NCOV w concurrence of Senior Vice President, Biomedical Services.
National BCLT Coordinator	Provide leadership to BCLT Regional Coordinators & facilitators, liaison with NHQ. Term: 3 years, maximum 2 terms	Knowledge of BCLT course content and purpose; chapter governance experience & beyond the unit positions; BCLT Regional facilitator or coordinator preferred.	Nominations by Regional/BCLT Coordinators and Regional Management Team; appointed by Chapter Operations General Manager.
Negotiated National Partnerships (i.e. Chair, Chapter Services; Chair, Disaster Services; Chair, AFES; Chair; Health & Safety Services).	Advance & accomplish the objectives of the Red Cross work unit with which partnership is associated. Term: 1 year, maximum 3 terms	Commitment to ARC mission & expertise in managing human, financial & material resources.	Varies by level of position.

Note: States, regions, and national headquarters may offer additional volunteer opportunities based on their needs.

SECTION EIGHTEEN:
RETAINING COMMITMENT OF VOLUNTEERS

Retention of volunteers depends on various factors, many beyond the influence of the Red Cross. However, good volunteer management practices can affect a volunteer's decision to continue involvement with the Red Cross.

Critical Time Periods for Retention

Based on experience and research, critical time periods for volunteer retention occur—

- During the first six months. The volunteer management functions associated with this period (placement, matching the volunteer and the job, orientation and training) set the stage for satisfaction or dissatisfication.
- When a volunteer's certification or appointment expires.
- When training requirements change.
- When large projects or events such as a major disaster end.
- When hours or credits needed are completed.
- When managers or supervisors change or the unit reorganizes.
- When new policies are implemented.

The volunteer administrator should ensure that planning for volunteer retention is included for any of these occurrences. While change in the volunteer population is normal, significant losses at any one time can be avoided with good retention planning.

Responsibilities of Volunteer Administrator

Retention requires attention to the individual. In addition to encouraging retention by effectively managing each function, volunteer administrators should give attention to retention as a separate function. Administrative actions associated with retention include—

- Establishing a system for monitoring volunteer retention. Know how many volunteers are leaving and the reasons that they are leaving.
- Educating supervisors and volunteer administrators about the reasons volunteers leave. Minimize barriers and correct problems that cause volunteers to leave.
- Evaluating each of the volunteer management functions on an annual basis to determine which function needs improvement in the unit and which individual managers need to improve.
- Compiling a unit profile of why volunteers leave. (When the answers are not obvious, conduct additional interviews with volunteers who have left.)

Responsibilities of Supervisor

A "no" answer to any of the following questions can help the supervisor identify areas of concern for retention:

- Does the job match the volunteer's expectations?
- Does the volunteer have opportunities for development?
- Does the volunteer see how the job contributes to meeting the Red Cross mission?
- Is the volunteer recognized in both informal and more formal ways?
- Does the volunteer enjoy volunteering? Does he or she have fun?
- Is the unit flexible in accommodating the volunteer's scheduling needs?

Retention of Spontaneous and Episodic Volunteers

Many volunteers prefer time-limited assignments, such as a project, a specific annual event, or a spontaneous offer to meet an immediate need in the community. Volunteer administrators need to be aware of the volunteer's need and expectation for a time-limited assignment and how that need can be matched with the needs of the organization.

Creating a positive single experience should be the primary focus for spontaneous and episodic volunteers, rather than regarding the event as an opportunity to recruit long-term volunteers. A positive image of the Red Cross for the first-time volunteer will create a "Friend of the Red Cross" in your community. This individual will share that positive experience with family and friends, thus elevating the image of the Red Cross in your community. The volunteer is also more likely to return as a volunteer, a financial donor, or a blood donor.

A strong recruitment push at an event involving first-time volunteers can leave a bad impression. However, a number of the organization's traditional volunteers first came to the Red Cross as spontaneous or episodic volunteers. The volunteer administrator should ensure that information on additional volunteer opportunities is posted at events, and that someone is available to answer any questions about volunteering that may arise.

How is Your Unit Doing?

Use the following questions to measure the effectiveness of your unit's volunteer retention. The more positive answers you have, the better you are doing.

☐ Yes ☐ No Does our unit have a system to track how many volunteers leave and the reasons they leave?

☐ Yes ☐ No Is the attention given to retention comparable to the attention given to recruitment?