

Handbook of Volunteer Management

Congratulations on deciding to create or recreate a volunteer program! This handbook is designed to take you through the important steps necessary in establishing a solid foundation for your program. Time spent in this planning process will greatly enhance your organization's success at recruiting and retaining volunteers.

1. Establishing the Vision

The first step in creating a successful volunteer program within your organization is to clearly establish its purpose and its relationship to the overall mission of your agency. Too often volunteer programs struggle unnecessarily because the agency has not taken the time to engage in this very important process. Agencies that hastily begin to recruit volunteers with the primary intention of "decreasing staff workload" will soon realize that this reason is simply not enough to carry a volunteer program to a successful level. Volunteer programs in fact require a great deal of time and energy for the recruitment, orientation, training, supervision and evaluation of volunteers. The volunteer program must therefore fulfill a larger purpose than merely "decreasing staff workload".

Thus, before beginning the process of volunteer recruitment, first become clear on the vision of the agency. What does the agency hope to accomplish over the next few years? What beliefs or ideals was the agency founded upon? If you are unsure, talk to other employees or clients that are familiar with the organizational purpose and mission. Use the space below to summarize the mission or vision of your organization:

Agency Purpose Statement:

Looking at the above purpose of your agency, imagine how your volunteer program will be most helpful in fulfilling this purpose or carrying your organization further in it's

intended direction. What qualities will volunteers bring to your agency's structure and function? How will the larger community benefit from your volunteer program? Use the space below to jot down your ideas of how volunteers will help fulfill the mission of the agency:

A second part to the above exercise examines the way in which the program will be benefiting the volunteers who should decide to join it. How will the lives of volunteers be affected by working at your agency? Will exposure to your agency's environment nurture volunteers in any way? How so? Think for a moment about what your agency can offer to volunteers and write your ideas below:

The above statements will be very helpful in developing your volunteer program. Continue to refer back to them and feel free to revise this as you get new insights into the importance of your volunteer program. This is your volunteer program vision.

You may want to use this space to create a visual concept or "mind map" of your program vision:

II. Sharing the Vision

Now that you have an idea of the significance of a volunteer program for your organization's mission, it is important that you gain the support of all staff for this program. Successful volunteer programs require input and attention from all staff involved. If there are employees who do not like the idea of volunteer involvement, these fears and concerns should be overtly addressed. Nothing is more detrimental to volunteer retention than feeling unwelcome by staff.

Perhaps the best way of first relaying your ideas regarding volunteer involvement in your agency is through an All-Staff meeting presentation. The presentation should include the following components:

1. The vision of the agency/program
2. The need within the agency in fulfilling this vision
3. How volunteers can help meet this need

Use the space below to jot down some of your main points:

Vision of agency/program: _____

The need: _____

How volunteers can help: _____

In addition to presenting the vision of the volunteer program to the staff, it is also important to offer a realistic picture of what this will involve and how it will affect the agency. Depending upon the type of volunteer jobs that are created, staff will need to adjust in some ways. For example, office volunteers will need to feel included in the agency and ideally be treated similar to new staff members. Off-site volunteers will require extensive training and support by designated staff. Even staff members who will

not be interacting at all with volunteers will need to be aware of the extra duties of those who do. Finally, a budget needs to be drafted and approved for the implementation of a volunteer program. Below are some topics that are important to address when designing a successful program. Jot down some answers to the following questions so that you may present them briefly at the staff meeting:

How will the development of meaningful volunteer duties and job descriptions occur? Will it be a collaborative effort with other staff or will you develop them on your own?

How will the integration of volunteers into your agency affect the physical space? Where will volunteers be performing their work? Does desk space need to be created? Is there space for them to store their personal items? Will they be included in staff meetings and events? _____

To what extent will staff be expected to interview, train, supervise and interact with the volunteers? Who will primarily orient them to the agency and be the main contact person during their service? What are your plans for recognition activities? _____

What is the ballpark budget needed for the volunteer program? Realistically, how many hours of staff time are needed for recruitment, interviewing, training and supervising each volunteer? How much money is needed for recognition? _____

The above answers do not need to be absolute, but they will help in offering the agency members a realistic image of what the volunteer program will consist of and how it might affect their day-to-day environment. A volunteer program requires a *commitment* from all parties involved in order for it to be truly successful.

IV. Developing Volunteer Job Descriptions

After you have gained support by staff members at your agency, it is important to sit down with interested parties and assess their current volunteer needs. Dream big, again focusing on the overall vision of the agency and how each person can better fulfill this vision. Are there projects that would be helpful? On-going duties? Are there areas in which the staff person does not feel skilled enough to do? Is this staff person prepared to spend some time providing quality training and supervision? If not, do you feel qualified to provide the training yourself? Use the space below to jot down duties that emerge during your staff assessment interviews:

Department/Duties/Supervisor:

You may find as you speak with more and more staff that themes and similarities arise in such general areas as outreach, follow-up, client services, administrative assistance, or publicity. This is an ideal collaborative opportunity whereby one volunteer could perform duties that greatly benefit the needs of several personnel and departments. In the space below list any common themes that you can identify from your interviews.

The message:

If themes emerge in your assessments you may require more than one type of volunteer job opportunity. For example, staff from various programs may require administrative help so that they can perform client follow-up and evaluation surveys; in addition, help might be needed in order to have more extensive or targeted outreach.

Now that general job duties have been identified, it is time to begin creating effective volunteer job descriptions. Written job descriptions have multiple functions:

1. They serve as marketing tools for recruitment.
2. They serve as the primary guide for screening volunteers because they specify minimum qualifications needed.
3. They are a reference for supervision and evaluation measures.
4. They serve as a contract between the volunteer and the agency and offer parameters of responsibility.
5. They provide information about volunteers' job responsibility, etc. to co-workers.

One of the key reasons that a volunteer leaves his/her position is that the reality of their duties did not match their notion of what they expected. Job descriptions allow both volunteers and staff to operate from the same set of expectations. The following are elements of a well written job description:

Job Title: This should be descriptive of the overall role that the volunteer will have in supporting the agency. (Remember, *volunteer* is a pay category, not a job title so omit this word!)

Reports to: Who will train this volunteer and oversee his/her work?

Major responsibilities: What will be delegated to the volunteer from beginning to end? Describe the general activities that this person will be doing.

Purpose: What is the mission of the agency and how does this position fit into the mission? What effect will this person have on the larger community?

Qualifications: What skills would you like the volunteer to enter with? What attitude or personality is important for this position?

Minimum Age: This limit will help you with the initial screening process, but do not include if you do not have any restrictions.

Training: What training will you offer this volunteer in terms of both skill development (i.e. computer software) and areas of increased knowledge (i.e. AIDS/HIV symptoms and treatments)? How many hours of training will the volunteer receive?

Time Commitment: Is there a specific time during the week that this job must be performed or is it flexible? What is the minimum number of hours per week needed to perform this job? What is the minimum monthly commitment that you feel is necessary to make it worthwhile to train a new volunteer? (*Remember, this could eliminate a large number of potential applicants so only offer restrictions if absolutely necessary.*)

Benefits/Incentives: What tangible and intangible benefits will the volunteer gain from working at your agency in this position? Can you offer any reimbursements for parking/travel or in depth transferable skills training? Will the volunteer get any discounts or special passes?

Work location: Where will the job be performed? Is it easily accessible by car or public transportation? Can any of the work be done at home?

Contact Information: Who will be coordinating the inquiry and application process? Be sure that this person knows they are responsible for returning potential volunteers' calls promptly.

On a separate page, draft a volunteer job opportunity that includes the above sections. This description may change as you begin to target your audience in the recruitment phase.

V. Getting Ready for Recruitment

Now that you and your staff have a clear idea of what the volunteer(s) will be doing at your agency, it is important to be organized and prepared for their arrival. The following is a checklist to help prepare your agency for the incoming volunteers:

- ❑ Sufficient office space and/or storage space has been allocated for each volunteer.
- ❑ Job descriptions have been agreed upon by staff, especially those who will provide direct supervising and training components.
- ❑ A budget has been approved by the Executive Director for recognition events, training time and recruitment expenses.
- ❑ Legal and liability issues pertaining to volunteer involvement have been resolved.
- ❑ Safety and confidentiality concerns have been recognized and addressed.
- ❑ Transportation and parking accommodations have been identified.
- ❑ Written policies and procedures for the volunteer program have been created and distributed to staff.
- ❑ A volunteer manual and/or an in-depth orientation to the agency have been designed with information important to volunteer success presented in writing.
- ❑ A record-keeping system has been created that includes volunteer information (applications, volunteer demographics, hours logged, duties performed), forms (assessment, evaluation, interview), and procedures (recruitment, recognition, annual plan, mission and goals of program).

VI. Recruitment

At this point you are ready to begin recruiting. Now it is time to start looking at your agency and the job description from a potential volunteer's perspective. Questions to ask yourself are - who might be interested in donating their time with us? Why would they be interested? Write down your thoughts below:

Looking at the above descriptions, are these persons that you would be interested in having as volunteers? If not, then you must revise your job description to suit your intended audience. Alternately, you may need to examine your own biases and fears in working with certain individuals. We often underestimate the capacities of persons due to our own unconscious prejudices. Elderly individuals, youth, and persons with disabilities can prove to be very competent if given a supportive environment and an opportunity. Remember that volunteerism requires compassion on both ends of the relationship: agencies need to be willing to open their doors to persons volunteering for many different reasons while, at the same time, being honest about what they can realistically offer a volunteer.

Below is a list of some of the main reasons that people choose to volunteer. Mark down whether your agency can offer support to these motivations:

Reasons why people volunteer:			Supported by our program? How?
Want training in a specific skill	yes	no	_____
Want to socialize with others	yes	no	_____
Want to gain leadership skills	yes	no	_____
Want to work with particular population	yes	no	_____
Want to receive recognition	yes	no	_____
Want to contribute to a certain cause	yes	no	_____
Want to have fun	yes	no	_____
Want to learn responsibility	yes	no	_____
Want to gain self-esteem	yes	no	_____
Want to fulfill school requirement	yes	no	_____
Want to fulfill service requirement	yes	no	_____
Want to be in an exciting environment	yes	no	_____
Want a change from their routine	yes	no	_____
Want to make community connections	yes	no	_____
Want to prepare for the workforce	yes	no	_____
Want to feel useful	yes	no	_____
Want a change in their environment	yes	no	_____
Other: _____	yes	no	_____
Other: _____	yes	no	_____
Other: _____	yes	no	_____

There are a multitude of reasons why people choose to volunteer and often one person has many reasons. Knowing in advance some of these potential motivations will help you find well-suited volunteer matches for your agency. Place a star or red mark by those motivations above that your agency is especially equipped to handle. These will be your primary recruiting themes.

Your recruitment message is different from your volunteer job description. The message needs to first grab the individual's attention and then speak to their personal motivation. The eye-catching phrases that speak to various motivations include (1) a statement of need (i.e. "Every 15 seconds a woman in this country is beaten"); (2) a stated solution (i.e. "You can make a difference to the lives of thousands of children!"); or (3) a stated atmosphere (i.e. "Gain valuable work experience!")

Your primary recruiting themes will emerge in these statements and will be what will catch the eyes of potential volunteers. You may wish to use all of them in the same message or separate them into various targeted delivery themes.

Once persons are interested they will read on to gather additional information indicated in the volunteer job description (hours, minimum requirements, location, contact person). If space is limited, just supply the contact information. Be warned, however, the less information you provide in a recruitment statement, the more you will need to address over the phone or in the interview phase. Think about how much screening you wish the recruitment to accomplish. You may want to start large (i.e. recruiting all persons who are remotely interested and thus include little detailed information) and slowly work into a target group (i.e. including detailed information such as skills needed, age minimum, and hours of commitment) as the calls begin coming in.

Some possible general recruitment sites are: city and neighborhood newspapers; church newsletters and bulletin boards; placement offices at schools and colleges; community and recreational centers; and, of course, your local Volunteer Center.

In addition, if your agency attends events that relate to particular interests and causes, by all means display your volunteer opportunity alongside your pamphlet information. Once your volunteer program is up and running, your agency may even wish to make the volunteer opportunities an integral part of brochure or newsletter information. Depending upon how large you envision your volunteer program becoming, you may even have an agency voicemail message that refers callers to a specific extension for volunteer opportunity information.

As your volunteer program becomes more established, word of mouth will probably be your best recruitment tool.

VII. Interviewing Potential Volunteers

While you may feel so thankful for receiving any responses from potential volunteers that you are willing to accept people on the spot, it is very important to have some interview and selection process in place. The purpose for this is threefold: First, you have a responsibility to uphold your agency's standards by selecting only those persons whom you feel will not jeopardize the quality of your services. Second, potential volunteers will feel more respected if you treat the selection and admission process seriously. No one wants to feel like they are accepted because an agency was simply desperate for any warm body! Third, this process will enable you and the volunteer to determine if it is a good fit on both ends. The interview process sets the tone of the volunteer program and is an important beginning to a committed and mutual relationship.

The procedures for the interview and selection process will depend upon the nature and responsibility of the position. Volunteers who will be mentoring children or counseling frail elders will most definitely need to undergo a more rigorous screening process than those volunteers who will be planting trees or stacking books. The following lists the steps of an inquiry/ interview process:

1. Respond quickly and with enthusiasm to the potential volunteer's initial inquiry.
2. Answer any initial questions over the telephone and ask the potential volunteer to come in for an in interview in person if they are still interested. Will you be doing the interview or will the direct supervisor be doing the interview?
- 3a. If you are doing the interview, set up a time (within a week) for the interview to occur at your agency. Schedule a comfortable time (usually a half hour) and a comfortable (private) meeting place.
- 3b. If another person will be doing the interview, take down the important information and pass it on to them. Make sure that this person gets in touch with the potential volunteer in a timely manner or set up the interview yourself between the parties.
4. When the potential volunteer arrives, make him/her feel welcome and at ease. Greet them warmly and show them around the agency.
5. Clarify the purpose of the interview and establish a time frame.
6. Have open ended-questions designed that will enable you to get the most out of the interview (see below for some examples).
7. Share ample information about the agency environment and mission. Talk in detail about what the volunteer job involves and show the applicant the job description.
- 8a. If you get an immediate sense that the applicant is appropriate, let the applicant know this at the end of the interview and ask if they are still interested. They may need to think about it and get back to you or they may be able to tell you right away.
- 8b. If you get the impression that the applicant is not appropriate, let him/her know this right away and explain why in a compassionate and straightforward way. It is much better to be upfront at the onset than to leave a person hanging with a statement such as, "I'll get back to you". Alternately, there may be another position at your agency that the applicant would be more suited to. If this is the case, you may want to suggest it.
- 8c. If you are undecided whether the person is appropriate, it is helpful for another person (perhaps someone who is more familiar with the nature of the job) to hold a second interview. This should be scheduled right away.
9. Thank the person for taking the time and having the interest to come in for an interview.

10. Keep a record on file for this person, including basic information (address, phone number, gender, age) and interview notes. Include your impressions and whether this person was accepted or not accepted for the volunteer job.

The following are suggested interview questions. Write down any others that you can think of:

Closed-ended questions:

- Can you work in the (evenings/weekends/daytime) ?
- Are you able to type/speak Spanish/lift heavy objects ?
- Other: _____
- Other: _____
- Other: _____
- Other: _____

Open-ended questions:

- What are your experiences with children/seniors/disabled/office work ?
- Tell me more about your self/interests/work style/career path ?
- What do you like/not like about working in an office/working with children ?

Important general questions:

- What attracted you to this volunteer job?
- How does this fit into your life right now?
- What are you hoping to gain by working here as a volunteer?
- What type of supervision or training are you needing?
- What experience have you had working as a volunteer? What did you like/dislike about it?
- Other: _____
- Other: _____
- Other: _____
- Other: _____

Tips for successful interviewing:

Try not to ask leading questions

Do not ask about marital status/race/age/sexuality/conviction record/educational achievement unless the agency has a legitimate reason for knowing this information (these may be requested on a form but no pressure should be placed upon the applicant to answer). It is illegal to base acceptance procedures on these demographics.

Listen and appreciate what the applicant is saying.

Be clear ahead of time on what qualities you are looking for that will help you make a good decision.

Do not judge solely on personality.

Be respectful of time but take more time if needed and ask the applicants permission to go overtime.

Use deepening or clarifying questions that build upon what the applicant has said.

Do not interrupt; allow time for pause and thoughtfulness before a question is answered.