Volunteer Program Management

A RESOURCE MANUAL FOR LEADERS OF VOLUNTEERS

United Way

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Volunteer Program And Manager

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After examination of numerous volunteer programs identified as "exemplary" within their communities, the Paradigm Project identified the following characteristics that tend to occur in successful volunteer programs. Steve McCurley and Rick Lynch, in *Volunteer Management: Mobilizing all the Resources of the Community*, also suggest the following as outside standards of operation against which to measure your volunteer program.

Lay the Foundation through Mission and Vision:
- The mission and priorities of the organization are framed in terms of the problem or issue the organization is addressing, not its short-range institutional concerns.
- There is a positive vision - clearly articulated, widely-shared and openly discussed throughout the organization - the role of the volunteers.
- Volunteers are seen as valuable human resources that can directly contribute to achievement of the organization's mission, not primarily as a means to obtaining financial or other material resources.

Combine Inspiring Leadership with Effective Management:
- Leaders at all levels - policy-making, executive and middle management - work in concert to encourage and facilitate high impact volunteer involvement.
- There is a clear focal point of leadership for volunteering but the volunteer management function is well-integrated at all levels and in all parts of the organization.
- Potential barriers to volunteer involvement - liability, confidentiality, location of the organization, hours of operation, etc. are identified and are dealt with forthrightly.

Build Understanding and Collaboration:
- Paid staff are respected and are empowered to fully participate in planning, decision-making and management related to volunteer involvement.
- There is a conscious, active effort to reduce the boundaries and increase the teamwork between paid and volunteer staff.
- Success breeds success as stories of the contribution of volunteers - both historically and currently - are shared among both the paid and volunteer staff.

Learn, Grow and Change:
- There is an openness to the possibility for change, an eagerness to improve performance and conscious, organized efforts to learn from and about volunteers' experience in the organization.
- There is a recognition of the value of involving, as volunteers, people from all segments of the community, including those the organization seeks to serve.

Program Planning and Administration
- Assess/analyze agency and client needs for assistance.
- Articulate a vision for volunteer involvement in the organization.
- Develop volunteer program goals and objectives.
- Design volunteer assignments.
- Develop risk management procedures and strategies.
- Coordinate schedules.
- Set policies and procedures.
- Manage budget.
- Meet space, supply and other support needs.
- Advocate for volunteers.
- Develop new projects.
- Develop own professional skills.

Recruitment and Public Relations
- Plan recruitment strategies.
- Develop recruitment and medial relations materials.
- Handle public speaking and personal contacts.
- Manage ongoing recruitment efforts.

Interviewing and Screening
- Prepare for applicants.
- Conduct interviews.
- Screen candidates.
- Assign volunteers.
- Facilitate group volunteer involvement.

Orientation and Training
- Develop an orientation program for all volunteers, regardless of assignment.
- Offer staff development in how to work effectively with volunteers.
- Design initial training plan.
- Develop in-service training options.
- Prepare manuals and handbooks.

Supervision
- Handle direct supervision of volunteers and employees working with the volunteer office.
- Handle indirect supervision, supporting those to whom volunteers are assigned.
- Be a liaison, available to all volunteers and salaried staff as a next step in the "chain of command."
- Manage individual volunteer performance assessment.

Motivation and Recognition
- Assure ongoing volunteer motivation and appreciation.
- Plan and conduct recognition activities.
- Develop "career ladders" for volunteers.

Record-keeping and Reporting
- Develop a comprehensive volunteer record-keeping system
- Maintain system.
- Develop reports.

Program Evaluation
- Conduct regular program evaluation.
- Assess ongoing progress in all program components.

Other Responsibilities
- Participate in agency fundraising events, coordinating volunteer assistance.
- Solicit in-kind donations to assist agency services.
- Represent the organization at community functions; represent the organization to visiting community members.
- Provide technical assistance to other agency volunteer efforts, such as board development, working with auxiliaries, etc.
- Promote volunteerism as an avenue for personal and professional growth, and as a resource for addressing community problems.

It Starts With You ...The Volunteer Administrator

By Jeanne H. Bradner

Introduction

We know how important our profession is. Yet we are often frustrated in trying to communicate its significance to our bosses, our board chairs, our funders, the not-for-profit and government community and, even, our families and friends. How we cringe when someone says, "we ought to start a volunteer program" and turns to someone on staff and says, "in your spare time, won't you look after the volunteers?"

We cringe, too, when we see that fundraisers, on the average, are paid almost twice as much as volunteer administrators when we know that volunteer administrators are responsible for generating $176 billion in in-kind human resources--the equivalent of nine million full-time employees. (Source: Independent Sector, 1992, Giving and Volunteering in the United States.)

We know that our jobs take the most delicate and sensitive skills in human resource management because we must give our human resources a "motivational paycheck" that keeps them coming back. The thesis here is that in order to build the kind of respect we want for our profession, 'It starts with us ... the volunteer administrator"-we need to think about ourselves and how we advocate forcefully for the profession and its integral role in helping to meet the many needs in our society.

The things we can do are:

1. Acknowledge our skills
2. Be proud of our job description
3. Be a spokesperson for our ethics
4. Renew our competencies
5. Advocate for our profession

Acknowledge our Skills

Workshop participants looked over the following list of words. Very quickly we checked any that seemed appropriate in describing our work, and we also felt free to add any that were left out:

- Resource Developer
- Manager
- Human Resources Director
- Leader
- Coordinator
- Motivator
- Communicator
- Psychologist
- Community Organizer
- Trouble Shooter
- Buffer
- Advocate
- Planner
- Consensus Builder
- Needs Assessor
- Trainer
- Evaluator
- Matchmaker
- Lobbyist

All agreed that these words are appropriate, and a few more words were added, including Negotiator and Mediator.

We then all agreed that this is a significant list of skills that we have developed in our jobs-many of the same skills that are necessary in top manager /leader positions.

Be Proud of Your Job Description

We then reviewed a job description for a volunteer administrator which I had written years ago. This came about because a friend of mine was a new volunteer administrator. She called and told me how much she loved the job but said, "you never told me how difficult it would be." With my tongue slightly in my cheek, I wrote this want ad for a volunteer administrator and sent it to her:

WANTED: A manager and developer of resources valued at millions of dollars.

Good communications skills, oral and written, are required, as well as a thorough knowledge of community needs and services. Applicant must have an understanding of marketing principles to promote exchange of implicit and explicit benefits. Applicant must have an understanding of psychology, participatory planning, motivation and human values. Applicant must possess the ability to lead and inspire others; be able to delegate authority; survive ambiguity; and be innovative and creative. Applicant must strive for the highest standards of human dignity, personal privacy, self determination and social responsibility.

Be a Spokesperson for Your Ethics
We then discussed the need to articulate the ethical framework in which we manage our program. Some items to be included in our ethical statement are:

- Our philosophy of volunteerism
- Concern about human dignity: volunteer/paid staff /recipient
- Self determination: involvement of paid staff, volunteers and recipient in decisions affecting them
- Respect for privacy and confidentiality
- Enhancement of volunteer/paid staff relations
- Equal opportunity/cultural diversity

We then discussed how when we have developed and articulated our ethics, we are able to be spokespersons for them in our organizations, thereby gaining more respect for volunteerism and our own roles.

Renew Competencies
We reviewed the AVA summary of competencies and acknowledged the need for joining support groups of peers.

Advocacy
We then broke into small groups and discussed things we could do to advocate on behalf of our profession. Some items mentioned were:

- Join professional associations
- Compute the dollar value of volunteer time; give to the board of directors regularly
- Ask to serve on your agency's long-range planning committee
- Have a board member serve as your volunteer development chair
- Find out the dreams of board and staff implement some through a volunteer program
- Work for legislation that promotes volunteerism
- Encourage others to join the profession through job fairs and career counseling
- Encourage funders to demand proof of volunteer involvement in programs
- Network--not just with other volunteer administrators, but also with journalists, fundraisers, executive directors, foundation executives
- Give workshops and speeches
- Write articles and letters to the editor
- Work on your CVA
- Encourage college courses in volunteer administration

Conclusion
If we can do these things, we will gain more respect for our profession and ourselves. But, most important, we will build a stronger vision of and commitment to the capacity volunteers have to make positive changes in our society.

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Volunteer Administrator Job Description
(Agency name / Address)

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Job Title:	Volunteer Administrator
Job Definition:	Responsible for creating, directing and managing an agency/organization volunteer program that supports the greater organizational goal of providing ………….to people in need.
Report To:	Executive Director
Organization Position:	Equivalent to a department head with support staff and budget necessary to operate the program.
Compensation:	Salary / Benefits This is a full-time exempt position

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

Qualifications:
- Associate degree or equivalent, and two (2) years management experience. Experience may be paid or unpaid
  - e.g.: Office manager, organization or board president, department director in public or private sector, chair of major fund-raiser

- Knowledge and experience in human relations
-
  Communications skills experience
  - e.g.: Newsletter editor, media coordination, writing, public speaking

- Organizational experience
  - e.g.: Committee planning, staff development, training experience, volunteer management

- Knowledge of the community
  - e.g.: Business and corporate contacts, familiarity with the not-for-profit sector, funding sources

- Demonstrated commitment to volunteerism
  - e.g.: Previous volunteer experience

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OVERVIEW: The most successful volunteer relationships are those where:

- There is a clear need for the services of volunteers
- The volunteer has the skills and/or training necessary to the job;
- Both the organization and the volunteer know what the other expects out of the relationship
- The volunteer is continuously supervised, supported and rewarded by staff in a way that is meaningful to the volunteer

THE SEVEN STEPS:

1. Getting Ready: Volunteer Needs Assessment & Job Descriptions

   - **Staff Readiness:** Assess staff readiness to involve volunteers. Troubleshoot barriers. Support good paid staff-volunteer relations. Make volunteer development a part of everyone's job!
   - **Needs Assessment:** What needs are there in your community, in the population you serve and at your organization that could be met by engaging volunteers?
   - **Current Situation:** What positions are volunteers already filling at your organization? What's working and what's not? Talk to your staff, and the volunteers themselves?
   - **Dream!**: Think about ways that volunteers could expand existing programs or even start new ones.
   - **Volunteer Job Descriptions:** Write a different job description for every possible volunteer position you come up with. Be sure to think about who will supervise and support the volunteer and what skills are required to fill the volunteer role.

2. Finding Volunteers: Recruitment

   - **Who?:** Think about the ideal volunteer for each position. What skills or attributes must the person have? Where can you find this person? Get the work out about your program.
   - **Connected People:** The easiest volunteers to recruit – and often the best volunteers – are people that already have a connection to a program.
   - **Program Staff** are the best people to recruit volunteers – they are knowledgeable and excited about the programs – and will likely be the primary people supervising and supporting new volunteers.

Excerpted from "7 Steps to a Successful Volunteer Program", YMCA of Greater Seattle, April 11, 2001

- **Partner organizations:** Find out what other organizations and companies are operating in your community that you might be able to recruit from. Is there a university or community college nearby? Is there a Senior Center down the street? Are there service clubs such as Elks, Kiwanis or Rotary? Some of these organizations may already have service learning or outreach programs in place that you can tap in to. Build relationships with these organizations.

3. Applications and Screening: Making the Match

- **Applications & References:** Have candidates fill out a volunteer applications (if appropriate). Check references for the volunteer (again, if necessary)
- **Interview & Job Description:** Interview potential volunteers to make sure you have a good match. Agree on a job description with the volunteer. Have the volunteer and supervisor sign the job description (or volunteer contract) to make sure expectations are clear to all parties. Copy for organization and volunteer.
- **Background Checks:** When volunteers will have access to children or vulnerable adults, be sure to complete any and all necessary background checks (criminal, state patrol, sexual predator, etc.) Sign release forms and waivers.
- **Just Say No:** Not every potential volunteer will be a match for your program. It is perfectly reasonable to turn some volunteers away.

4. Orientation and Training

- **Your Organization:** Orient all new volunteers to your organization: the mission, values and goals, as well as the history and future plans for your organization. Provide volunteers with a volunteer handbook including all policies and procedures
- **Their Job:** Orient new volunteers to the purpose of the program and population they will be working with. Provide ongoing resources to help them carry out their duties
- **Training and Certification:** Provide volunteers with trainings or classes that will improve their capacity for carrying out volunteer duties. Be sure volunteers have completed required trainings, if any before beginning their assignment.
- **Ongoing Development:** Provide opportunities for ongoing training and development of volunteers.

5. Supervising and Supporting

- **Communicate:** Communicate frequently with your volunteers. Assist in resolving any conflicts between volunteers and supervisors.
- **Revisit Job Descriptions:** As a volunteer's duties expand or change, update volunteer agreements and job descriptions. Have volunteers sign these agreements.
- **Connect Volunteer:** When appropriate, treat volunteers like staff – invite them to staff meetings, include them in organizational decisions, welcome their ideas and opinions about your organization and programs.

Excerpted from "7 Steps to a Successful Volunteer Program", YMCA of Greater Seattle, April 11, 2001

Tracking, Retaining & Recognizing

- **Track:** Track all volunteer hours, contributions and duties. This will allow you to recognize volunteers at appropriate anniversary dates (one year, five years, etc.) as well as report to funders the important contributions that volunteers are making.
- **Recognize:** Make sure your volunteers feel valued and needed at all times. This can be done formally or informally. Say "thank you"; hold a recognition event; put up a bulletin board recognizing your volunteers; have participants send cards or make phone calls to thank your volunteers. Create a plan to do this!
- **Adding Meaning:** Find out what is important to your volunteers and create personalized, individualized recognition pieces for each volunteer. Some people prefer to be publicly thanked, some would prefer a certificate, and others simply want to feel connected to the organization through personal relationships. Find out your volunteers' birthdays and send them a card.

6. Evaluating and Improving

- **Feedback:** Provide opportunities at leas once a year for staff and volunteers to evaluate and provide feedback on the volunteer program, volunteer duties and the organizational attitudes about volunteers.
- **Exit Interviews:** When a volunteer leaves the organization, conduct and exit interview to find out the strengths and weaknesses of their experience
- **Improve:** Use the information you get in formal and informal ways to improve, update and change your volunteer program.

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VOLUNTEER RESOURCES MANAGEMENT CHECKLIST

Elements of Volunteer Resources Management	Currently in place to a large degree	Currently in place to some degree	Not currently being done	Not applicable or not relevant
Written statement of philosophy related to volunteer involvement				
Orientation for new staff and members as to why and how volunteers are involved in the organization's work				
Designated manager/leader for overseeing management of volunteers program-wide				
Periodic needs assessment to determine how volunteers should be involved to address the mission				
Written position descriptions for volunteer roles				
Written policies and procedures for volunteer involvement				
Organizational budget that reflects expenses related to volunteer involvement				
Periodic risk management assessment related to volunteer roles				
Liability insurance coverage for volunteers				
Specific strategies for ongoing volunteer recruitment				
Standardized screening and matching procedures for determining appropriate placement of volunteers				
Consistent general orientation for new volunteers				
Consistent training for new volunteers regarding specific duties and responsibilities				
Designated supervisors for all volunteer roles				
Periodic assessments of volunteer performance				
Periodic assessments of staff support for volunteers				
Consistent activities for recognizing volunteer contributions				
Consistent activities for recognizing staff support for volunteers				
Regular collection of information (numerical and anecdotal) regarding volunteer involvement				
Information related to volunteer involvement is shared with board members and other stakeholders at least twice annually				
Volunteer resources manager and fund development manager work closely together				
Volunteer resources manager is included in top-level planning				
Volunteer involvement is linked to organizational or program outcomes				

This checklist was taken from A *Guide to Investing in Volunteer Resources Management: Improve Your Philanthropic Portfolio* (p. 15), published by the UPS Foundation.

PHILANTHROPY NEWS DIGEST
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THE SUSTAINABLE NONPROFIT

Posted on July 20, 2005

From the Heart: Managing and Valuing Volunteers
by Lee Mizell

Volunteers are a familiar feature of the nonprofit landscape and an important ingredient in the success of many organizations. Each year, about sixty-five million Americans volunteer a portion of their time, often to nonprofits. In addition to performing needed services, volunteers frequently bring much-needed energy and enthusiasm to an organization's mission or cause. But realizing benefits from volunteers doesn't happen automatically. It requires thoughtful planning and ongoing management. Research suggests that organizations with successful volunteer programs see volunteers as key to achieving their mission, treat them as important members of their team, provide them with flexible work arrangements, offer them regular feedback and support, and recognize their contributions to the organization. In short, they manage their volunteers professionally.

How can your organization professionalize its volunteer-management efforts? While there's no such thing as a one-size-fits-all approach, there are a number of basic practices that most nonprofits should be consider.

Get Prepared

Before developing or expanding a volunteer program, take a hard look at your daily operations and future needs. Ask yourself: What type of assistance do we need? What qualifications should our volunteers possess? Are we prepared to manage those individuals? Clarifying your organization's needs and examining its capacity to manage volunteers will ensure you are prepared when prospective volunteers knock on your door.

Being prepared matters. In fact, a study by the UPS Foundation found that poor management of volunteer's "time and talents" is a key reason they *stop* volunteering. If volunteers are (or will be) important to your organization, it's imperative that you have the necessary resources and framework in place to manage them successfully. This includes a volunteer strategy that has clear goals and objectives, a system to manage volunteers' time and efforts, and a budget. Take care, as well, to provide your volunteers with detailed job descriptions, adequate orientation and training, and hands-on supervision, just as you would paid staff. Given volunteers' importance in the success of most nonprofits, you should consider dedicating paid staff time to the task of managing them. If yours is a small nonprofit with limited resources, consider recruiting and training a volunteer with the right skills and commitment to act as your volunteer coordinator.

Being prepared also means being aware of legal issues. Do you know the legal definition of a volunteer? Are you aware of state and federal liability protections for volunteers? Is your organization required to conduct criminal background checks on volunteers? Another reason for taking a professional approach to managing volunteers is that legal issues involving your volunteers will arise, and you need to be aware of them. Learn about the laws, regulations, and requirements that apply to your organization, your volunteers, and your clients. If you have any concerns about them, seek professional advice and resolve any questions before you launch a volunteer recruiting campaign.

Find the Right People

It's often easiest to tap into existing pools of volunteers. Many high schools and colleges require their students to volunteer a certain number of hours each term or semester. Check with schools in your area to find out how you can tap into this pool of motivated young people. Similarly, many corporations encourage their employees to volunteer, and retirees are often interested in maintaining an active, fulfilling lifestyle. Host a luncheon for local businesses and/or seniors to give them an opportunity to learn more about your organization and the good work it does. Personal contact and word of mouth are often the best ways to "sell" your organization to people in a position

WHO VOLUNTEERS?	
Characteristic	% Who Volunteer
Total, 16 years and over	29%
Women	32%
Men	25%
Education	
Less than high school degree	10%
High school, no college	22%
Some college, no bachelor's degree	34%
Bachelor's degree or more	46%
Race/Ethnicity	
White	31%
Black	21%
Asian	19%
Hispanic	15%
Age Category	

to help. You should also take advantage of the increasing number of Web sites that match volunteers with opportunities (e.g., VolunteerMatch), but don't overlook traditional methods such as targeted advertising in community newspapers, public service announcements, and things like bumper stickers (e.g., "My mom volunteers at...").

At the same time, don't be reluctant to reach out to untapped pools of volunteers. A house full of children, a disability, lack of familiarity with the community, or other factors may make it difficult for some would-be volunteers to find you. But these circumstances need not prevent someone from helping out. For example, residents of an assisted-living facility might be thrilled to stuff envelopes for your annual appeal or assist with a "get-out-the-vote" phone tree. Busy stay-at-home moms or dads can edit newsletters or Web pages once the kids are in bed. To facilitate access to your organization, be sure to have information about bus/metro schedules, driving directions, and handicapped-accessible alternatives readily available.

Whether you seek out volunteers or volunteers come to you, take the time to ensure that their interests, motivations, skills, and time fit your organization's needs. Volunteers are more likely to stick with tasks they find interesting; nonprofits are more likely to benefit when volunteers engage in tasks that add value. Also important is the match between your organizational structure and a volunteer's personality. Flat or virtual organizations may do better with self-starters who are comfortable working in a more flexible environment with minimal supervision. Large, hierarchical organizations may be able to offer more supervision.

Make the "Ask"

Asking people to volunteer may seem obvious, but you'd be surprised how many nonprofit organizations wait for volunteers to come to them. (Two in five volunteers report that they approached the organization they volunteer for). When approaching prospective volunteers, remember that a personal touch works best. Individuals are more likely to volunteer if they are asked by someone they know. In fact, your current volunteers may be your best recruiters. A study by the Urban Institute, "Volunteer Management Practices and Retention of Volunteers," found that "enlisting volunteers as 'spokespersons'...implies a level of trust in these participants, evidence of both a supportive organizational culture and confidence that the charity provides a worthwhile experience to volunteers."

Volunteering is a choice about how to use one's limited personal time, and rarely will your organization be the only option available to a prospective volunteer. So sell yourself. Be clear about what you stand for, how you use your volunteers, and how that person will benefit from donating his or her time to your organization. And don't use the same pitch for everyone: Be serious, be funny, be creative, as the situation demands. Data suggest that older volunteers appear to prefer to work with religious organizations, while younger individuals tend to favor educational and youth service organizations. Parents with young children often volunteer at educational and youth service organizations (e.g., a school or sports league), while parents without young children gravitate toward social or community service groups. Use this information to your advantage.

Screen Effectively

In your eagerness to find volunteers, you may be tempted to undersell the commitment you require or take whoever walks through the door. Don't. Be honest about the commitment and qualifications you require, and screen volunteers just as you would potential paid staff. (This is particularly important if your organization works with children or other vulnerable populations.) Always ask: Does this person have the qualifications, enthusiasm, and level of commitment we're looking for? Be sure to have potential volunteers go through an application process, check their references, provide them with adequate training, and conduct periodic reviews of their performance.

Make Volunteering "Pay"

In today's fast-paced world, it is increasingly difficult for most individuals to find time to volunteer. So when people do, be sure to recognize their contributions through newsletters, annual reports, and old-fashioned thank-you notes. Don't underestimate the importance of recognition as a motivator. Consider offering service awards or framed certificates to your best volunteers. If you use volunteers for short-term assignments that come up periodically, be sure to keep in touch, let them know you appreciated their involvement, and that you look forward to seeing them next time. This type of follow-up helps folks feel valued, and who knows...maybe next time they'll bring a friend.

Another way to make volunteering "pay" is to choose the right words to describe your volunteers. Some titles suggest a valued contribution more readily than others (e.g., board member, advisor, mentor). One of the things you can do to show your appreciation for your volunteers is to give them titles that mean something. It all adds up. Research suggests that organizations that implement recognition programs are better at retaining volunteers than those that do not.

Conclusion

There may be changes ahead with respect to volunteering. *Reinventing Aging*, a recent study from the Harvard School of Public Health and MetLife, suggests that the dynamics of volunteering are likely to change as baby boomers begin to retire. What won't change, however, is the need to take a professional approach to the recruitment, management, and retention of volunteers. Of course, good management practice need not crowd out the satisfaction that comes with a job well done. Remember that most volunteers aren't looking for a second job. They want to give back to their community, meet interesting people, work on important projects, receive a little recognition, and have fun doing it. So manage well, but keep the work fun and engaging.

Looking for more information on volunteer management? Here are 10 sites to get you started:
● Best Practices for Developing a Volunteer Program, an online guide from the Maryland Advisory Committee on Volunteerism.
● Energize, Inc., a training, consulting and publishing firm specializing in volunteerism founded by Susan Ellis.
● Service Corps of Retired Executives (SCORE), a national organization with 10,500 volunteers providing small business assistance.
● ServiceLeader.Org, a project of the RGK Center for Philanthropy and Community Service at the University of Texas at Austin.
● The Association for Volunteer Administration, an organization that promotes professional management of volunteers.
● The Best Practice Toolbox, resources from The UPS Foundation to help nonprofits effectively manage volunteers.
● The Nonprofit Risk Management Center, provides assistance and resources for community-serving nonprofit organizations.
● The Points of Light Foundation & Volunteer Center National Network, mobilizes millions of volunteers to solve social problems nationwide.
● The USA Freedom Corps, a Coordinating Council housed at the White House that works to strengthen volunteering.
● Volunteer Management Review, an online newsletter from the CharityChannel.

Dr. Lee Mizell works as a research and management consultant to public, private, and nonprofit organizations. She combines hands-on experience developing and managing social service programs with research expertise. In addition, she has spent time as a nonprofit board member, the chair of a social services commission, and as adjunct faculty.

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1. The law pre-empts existing state law except where state law provides additional protection to volunteers or where the state enacts a statute saying that the federal law will be non-applicable in that state.

2. The law applies to volunteers for both non-profit organizations and governmental agencies, and applies to both board and service volunteers.

3. The law applies only to civil cases, not to criminal cases.

4. The law removes the volunteers from liability if the volunteer committed negligent acts or omissions **while acting within the scope of his/her responsibilities.**

   The law does not protect volunteers if:

   a. The volunteer was not acting within scope of responsibilities at the time of the act or omission.
   b. The volunteer engage in willful or criminal misconduct, gross negligence, reckless misconduct, or a conscious, flagrant indifference to the rights or safety of others.
   c. The harm is caused by the volunteer operation of a motor vehicle.
   d. The misconduct constituted a crime of violence for which the volunteer has been convicted.
   e. The misconduct constitutes a hate crime, or involved a sexual offense.
   f. The misconduct involved violation of a Federal or State civil rights law.
   g. The volunteer was under the influence of intoxicating alcohol or drug at the time of the misconduct.

5. The organization for which the volunteer works receives no protection under the legislation and the organization can itself, still bring an action against the volunteer.

6. Punitive damages may not be awarded against a volunteer in an action brought for harm based on the action of a volunteer acting within the scope of the volunteer's responsibilities, unless the claimant establishes clear and convincing evidence that harm was proximately caused by an action of such volunteer which constitutes willful or criminal misconduct, or a conscious, flagrant indifference to the rights or safety of the individual harmed. The bill caps punitive damage at the lesser of $250,000 or twice economic/non-economic losses, and awards damages against an organization only to the degree of fault.

7. Definition of a volunteer: A volunteer is an individual performing services for a non-profit organization or a governmental entity who does not receive "compensation" (other than reasonable reimbursement or allowance for expenses actually incurred) or anything of value in lieu of compensation, in excess of $500 per year. This includes a volunteer director, officer, trustee, or one in direct service.

Insurance Basics for Community-Serving Programs
by Charles Tremper and Pamela Rypkema

http://nonprofitrisk.org/

Introduction

Because you may be sued, even if you have done nothing wrong, insurance can save your program and the people involved in it from financial disaster. Moreover, insurance provides a source of recovery when program activities cause harm. Without insurance your program may not be able to do the right thing when someone gets hurt.

As a preliminary guide to insurance, this booklet summarizes the most common types of coverage for community-serving organizations. While this booklet provides a foundation for buying insurance, to obtain adequate coverage you will need to work with an agent or broker to choose the best policies.

For some types of insurance, coverage depends on whether an individual serving your organization is an employee. Special arrangements may be necessary for volunteers. (This booklet uses "staff" to refer to any individual who serves on behalf of an organization.)

If the status of a staff member is not clear for insurance purposes, the safest strategy is to notify your insurer in writing and, if possible, have the word you use to describe the individual added to the list of "named insureds" on the policy. For example, an insurance policy for a National and Community Service Act program might list "employees, volunteers, and AmeriCorps participants." Alternately, you could clarify in your application or a letter to your insurer what types of positions you need to have covered. Failure to clarify this matter could result in denial of a claim.

Liability of the Organization

The most common type of liability insurance is the general liability policy that covers most claims arising from bodily injury, damage to property owned by others, and some types of personal injury, such as libel and slander. General liability coverage may be combined in a "package policy" that includes coverage for several other types of claims.

General liability coverage, like most insurance, is designed to pay the expenses that come with lawsuits, regardless of whether the claim is true. Thus, a policy will almost always pay for the defense of a claim within the policy's scope. It will also generally pay the cost of settling the claim or paying amounts ordered by a court.

Although virtually essential, the general liability policy is not comprehensive, so you should know what you are getting. The policy exclusions typically appear on a long list of items, some of which may be covered by other policies and some of which you can have removed by requesting endorsements to the policy.

Usually excluded are pure financial losses, use of a vehicle, rendering "professional" services, and types of harm that do not fit the list of covered claims. Excluded as "professional" may be the services of nurses, social workers, counselors, etc., whether or not those individuals are paid. Civil rights and employment claims are also commonly excluded.

An exclusion for sexual misconduct has become increasingly common. If you are vulnerable to such claims, you can ask the insurer to remove the exclusion, but you may be required to pay extra. Not having the coverage if you need it would be a bad bargain.

Staff Liability

Individual staff members can be named in a lawsuit, usually in addition to the organization itself. If so, they may need to pay for an attorney and sometimes have little choice but to settle a claim, even if they are blameless.

In most states, volunteer protection laws reduce those prospects for volunteers and even some employees of community-serving organizations, but no law provides complete immunity. (See back cover, State Liability Laws for Charitable Organizations and Volunteers.) Volunteers and employees of governmental entities may be protected by a tort claims act.

Insurance coverage depends on whether the suit is filed against an individual personally or against the organization itself. Claims against an organization that are within the scope of a general liability policy are covered by that policy regardless of who causes them.

If an individual is named in the suit, coverage may depend on whether that person is a volunteer or employee. The standard general liability insurance form includes employees but not volunteers. Options for covering volunteers are discussed below.

Volunteers may have adequate liability coverage under insurance policies they buy for other purposes. Most homeowners and renters insurance policies cover claims based on bodily injury or property damage. These two categories encompass ordinary accidents that are most likely to result in claims against a volunteer, but they are not comprehensive. (As explained below, a personal auto insurance policy ordinarily provides coverage for a driver engaged in community service.)

To be as clear as possible about coverage, a volunteer should check with the insurance agent who sold the policy.

Rather than requiring volunteers to rely on their own policies, an organization has several

options for providing coverage. The first is to include volunteers the same as employees under the general liability policy.

The trick is to make sure the policy covers claims against volunteers themselves and not just claims against the organization for the actions of volunteers. If you look at the policy, the critical word "volunteer" should appear either on the list of "insureds" or as an endorsement, usually called "Additional Insureds-Volunteers."

Low cost is the chief advantage of adding volunteers to a general liability policy. In some cases the coverage for volunteers is free. In addition, when the organization and its volunteers are included under the same insurance policy, the legal defense is coordinated by the insurer.

Alternatively, an organization can purchase a volunteer liability insurance policy, which has a single purpose: to protect volunteers from the financial consequences of being sued. Because this type of policy covers only the volunteer, the entire policy limit is available to the volunteer, rather than being shared with the organization as it is in a general liability policy.

The most common volunteer liability insurance policy available today is an "excess" policy. An "excess" policy s costs over and above coverage provided by any other policy the organization or volunteer may have. If no other policy applies, the volunteer insurance effectively becomes the primary policy.

With a few exceptions, a volunteer liability insurance policy covers the same types of claims as a general liability policy. Coverage for vehicle accidents and other types of claims is discussed below.

Injuries to Staff

Injured employees are ordinarily subject to the workers' compensation system. Employers typically purchase workers' compensation insurance to cover employees' claims, with various financing options available in some states. For volunteers, the matter is much less clear cut.

Volunteers who have their own health insurance coverage should be entitled to payment under those policies. Increasingly, though, health insurers require policyholders to pursue recovery from the party that caused their injury. The arrangements described below are suitable for that purpose and to pick up expenses that are not covered under a health insurance policy.

A few states allow the option of covering volunteers under workers' compensation. Where available, this alternative provides the assurance that volunteers will be adequately covered and may limit their right to sue the organization for their injuries. Insuring volunteers under workers' compensation has its drawbacks, though. Insurers are often reluctant to provide that coverage for volunteers, the cost is usually high, and if volunteers

file claims, the rate for all of the organization's workers may rise.

Coverage for a volunteer's minor medical expenses may be available under the general liability policy. That policy typically includes a "medical payments" provision that will pay expenses up to a set amount, usually in the range of $1,000 to $25,000, if an individual is injured on the organization's premises or perhaps in the course of the organization's "operations."

Other insurance arrangements can provide coverage similar to workers' compensation. An accident and injury policy can be purchased to pay a volunteer's medical expenses associated with an accident. Some policies cover vision care and dental care when required as a result of an accident. The policy does not include compensation for pain and suffering or other intangible losses.

Accident and injury insurance is usually offered as an "excess" policy, meaning that it pays only after other available medical insurance is exhausted. This includes the volunteer's personal medical insurance policy or the medical payments portion of a volunteer's automobile insurance. If no other policy applies, the accident policy would pay first. Some of these policies have no deductible. If payment of a deductible is required, an injured volunteer would still be out-of-pocket by that amount. (There is no deductible under workers' compensation.)

An Accidental Death and Dismemberment (AD&D) benefit may be included with the policy. In this case, the insurer will pay a predetermined sum for loss of life, limbs or sight arising from a covered accident. Alternately, an AD&D policy can be purchased separately.

Finally, a disability policy can be obtained for volunteers to replace income they might lose if not able to perform paid employment. As with AD&D, disability coverage might be included with an accident and injury policy.

Motor Vehicles

When a volunteer or employee gets into an accident while driving on an organization's behalf, the organization and the driver may both be held liable for the resulting damages. While the driver's (or owner's) insurance policy will be the primary coverage, a claim may exceed the limits of that policy.

The type of insurance needed to cover motor vehicle accidents depends on whether the organization owns the vehicle. Commercial auto insurance ordinarily covers use of vehicles by employees. Volunteer drivers can be added to the policy by endorsement.

Volunteers (and employees) who use their own vehicles on behalf of an organization will ordinarily be covered by their own auto insurance policies. If the use is extensive, however, or if individuals who ride with them are charged for being transported, an exclusion may apply.

For staff driving their own vehicles, a non-owned auto policy can provide coverage for the organization and, if endorsed, the staff member. With some carriers, this coverage can be included by endorsement to the commercial auto policy or in a package based on the general liability policy. Policies vary tremendously regarding the conditions under which they will pay a claim.

To cover only volunteers' personal liability, a volunteer driver excess auto liability policy may be purchased. These policies will pay on behalf of volunteers for amounts exceeding their own auto policies or, for some policies, the state-mandated minimum. Thus it is important for volunteers to maintain their own coverage. The policy will not pay for damage to the volunteer's vehicle or injury to the volunteer driver.

Boards and Executives

Directors and officers (D&O) insurance and association professional liability insurance (APLI) policies cover claims arising from governance and management. The traditional D&O policy covers only claims against directors and officers. Many D&O policies sold to nonprofits, as well as the APLI form, include employees and volunteers, as well as the organization itself.

Claims under D&O policies usually result from a bad decision that causes harm other than bodily injury or property damage, e.g., firing the executive director because she is "too old," using a targeted donation to pay general operating expenses, or ignoring reports that the executive director is misappropriating funds.

Whether a D&O policy covers these claims can be difficult to determine because D&O policies do not list specific types of claims covered. Instead, they typically extend coverage for any "wrongful act," which is very broadly defined. Various exclusions and limitations then narrow that coverage.

Some D&O policies, especially ones designed for business firms, exclude employment-related claims, including wrongful termination, discrimination, or sexual harassment. A policy with that exclusion substantially reduces the coverage for nonprofits because those are the most common types of claims filed against nonprofits under D&O policies.

Almost all D&O insurance policies differ from other types of policies in several critical respects. A little knowledge about insurance is especially dangerous when purchasing a D&O policy. Thus, reading D&O-Yes or No? (published by the Center) and working with an insurance professional who can clearly explain the implications of "claims made," "defense within limits," and "wrongful acts" will help you decide whether you need the coverage and, if so, which policy to select.

Special Events

Special events beyond the normal scope of an organization's activities may require

special insurance arrangements. The need is clearest if the event involves types of risks that are not covered under the general liability policy or other coverage the organization has in place. For example, guests at a fundraiser might be served alcohol or taken for a boat ride.

The general liability policy also might not apply if the magnitude of risk is much larger than anticipated in the application for insurance. A small organization that holds a walk-a-thon or conference could fall into that category. Special arrangements may also be appropriate if the organization is assuming liability via a hold harmless agreement or other contract provision.

While special events policies can be purchased, coverage for many events can be obtained under the general liability policy or an endorsement to it. That approach is usually more economical than buying a separate policy. Your agent or broker should be able to advise regarding the alternatives.

Financial Assets

Money has a way of disappearing. While the best defense against theft and misappropriation is to safeguard your funds, insurance can provide additional protection.

Crime insurance protects you both from the outside world and your own staff. Insurers offer a menu of various coverage forms so that you can tailor the coverage to fit your needs. The policy generally covers money and securities, other personal property, and property damage caused by burglars or robbers.

With respect to embezzlement or forgery committed by your staff, you may purchase a separate fidelity bond instead of selecting the employee dishonesty forms in the crime package. Irrespective of the form of purchase, this coverage can either specify individuals who handle money or securities, or bond all individuals connected with the organization. Policies that refer only to employees should be endorsed to include volunteers if they handle your funds.

Other Policies

Depending on the types and magnitude of the risks involved, a community-serving program may need a variety of policies other than the more common types described here.

For example, professional services may require malpractice policies, both for the individual practitioners and for the organization. The law recognizes, among others, physicians, nurses, dentists, pharmacists, social workers, attorneys, engineers, accountants, architects, realtors, and insurance agents as professionals. Because these unique professional exposures are not covered by the general liability policy, the insurance industry now offers specialized policies designed for these services.

While an incidental exposure maybe covered by your general liability policy (e.g., offering first aid to a volunteer injured on the premises), substantial activity must be treated by a separate policy. Your insurance agent can help assess the necessity of specialized coverage based on the services you perform.

After having made arrangements for primary coverage (e.g., general, auto, employers', and professional liability), you may still need higher limits of liability. An "umbrella" provides such limits. The umbrella insurer lists, or "schedules," the primary policies, and extends such coverage after the primary policies are exhausted. For example, you might buy a five million dollar umbrella over a one million dollar general liability policy. If you purchase an umbrella you must keep all the primary policies in place during the umbrella policy period. Failure to do so may void coverage.

Not only will an umbrella provide limits over and above the liability limits afforded on the primary policies, it can also be written to extend coverage to exposures not otherwise covered. It can be written to "drop d own" to the primary level to fill in gaps in the underlying policies. With most policies the claim will still be subject to a deductible, known as the "self-insured retention."

Umbrella policies that "drop down" normally cover infrequent exposures that do not warrant the purchase of a separate underlying policy. For example, renting a boat for a fund raiser may result in liability if someone is injured. If your organization does not own the boat, it might not need a watercraft liability policy. Instead, coverage could be provided by your umbrella.

Buying Insurance

Even for a small organization, buying insurance can raise difficult questions that are far beyond the scope of this booklet. Publications listed on the back cover and insurance professionals can elaborate on the guidance offered here.

Assistance of an insurance professional can be especially helpful when choosing policy limits and deductibles. Potential liability is generally unlimited, so no amount of insurance will necessarily be adequate. A reasonable amount depends on the likelihood and severity of the risks for your organization. An insurance professional should be familiar with the magnitude of claims in your area and can help you decide how much of a loss you can afford to pay yourself. Choosing higher deductibles can substantially reduce insurance premiums.

If you have difficulty when applying for insurance, consider the application to be similar to a grant proposal. Then you can rely on skills you already have!

You can portray the organization in the most favorable light, as long as you are absolutely truthful. Neglecting to inform an insurer of a hazard may invalidate the policy. Failing to attach requested audit reports or other documents may result in a summary rejection of an application, which in turn makes obtaining insurance from another company more

difficult.

As you describe the organization, keep in mind the one crucial difference between an insurance application and a funding proposal. For insurance purposes, an underwriter really does not care whether the organization does good deeds. What matters to insurers is the riskiness of the organization's activities and the extent of its precautions. Try to avoid words that may alarm an insurer. "Operating a halfway house for drug addicts" sounds scarier than "providing assisted living arrangements for substance abusers."

Finally, write out everything that you want an insurer to know. Telling something to an insurance agent may have no effect because agents themselves ordinarily do not decide whether to issue a policy.

Conclusion

While insurance may be necessary in case something goes wrong and for peace of mind even if nothing bad ever happens, it cannot replace commitment to preventing harm. Because even the best prevention strategies may occasionally fail, though, insurance provides some assurance for your organization and the people who make it run. Using this booklet can help you to understand your options so that you get the coverage you seek without spending more than necessary.

United Way of King County

There is a growing belief by nonprofit organizations that directors' and officers' liability insurance is no longer an essential risk management tool for protecting an organization for a wrongful act or omission. This belief exists because of a growing awareness by nonprofit organizations of liability protection afforded to them due to the federally mandated "Volunteer Protection Act of 1997." This protection provided by federal and state statutes was created to encourage volunteerism among communities. At its core, the "Volunteer Protection Act" was a giant leap forward for the nonprofit community. However, the new protections afforded to the nonprofit community is deficient and does not address significant exposures faced by most nonprofit organizations.

What is the Volunteer Protection Act and what does it cover?

"No volunteer of a nonprofit organization or governmental entity shall be liable for harm caused by an act or omission of the volunteer acting on behalf of the organization or entity."

Under this definition of coverage, protection is afforded to the volunteers unless one of the following occurs:

- The volunteer does something which is OUTSIDE their job description,
- The volunteer does not have the required licenses or certificate for the job being performed
- The volunteer's act that caused the injury was as a consequence of the operation of a motor vehicle
- The volunteer caused the injury with willful, criminal or reckless misconduct or gross negligence.

While the new laws allow nonprofit organizations to feel secure that their liability against wrongful acts are reduced, the laws are also creating a false sense of security since they have significant limitations.

Why do I need Directors' and Officers' Liability Insurance?

While extremely valuable, the intent of volunteer protection laws are to limit liability if a claim falls within the scope of the protection. However, the law does **not** prevent the volunteer from being sued. Furthermore, compensated individuals (the most obvious being compensated employees and directors or officers) are not provided protection under the law.

According to the laws, protection is also not provided if the misconduct is a crime of violence, hate, sexual in nature, committed while under the influence of alcohol, or if its a

violation of civil rights, labor, or tax provisions. For example, according to a Watson Wyatt Worldwide Survey Report, 22% of all claims are based on discrimination. As this is a civil rights violation, coverage would not be afforded to the volunteer being sued.

More importantly, should a volunteer be protected under volunteer protection laws, nothing in the law acts as a protection against a claimant seeking a remedy against the entity itself. Currently, most claimants automatically name the entity itself into its suit.

Directors' and Officers' Liability Insurance serves to protect an individual and entity against significant exposures which may not be covered under volunteer protection laws, such as those highlighted above. Generally, a volunteer may not learn whether or not their situation is applicable until a court determines the law to be applicable. Until this determination is reached, directors' and officers' insurance indemnifies the association and volunteer against legal defense costs. Most directors' and officers' policies are duty to defend policies. This means the insurance carrier has an obligation to provide a defense on behalf of the named insured.

The Volunteer Protection Act is a valuable piece of legislation. However, the act was never intended to replace existing risk management techniques, such as directors' and officers' insurance. Appropriate risk management requires a nonprofit organization to take all appropriate steps necessary to insure a secure financial future, even if some precautions overlap.

This article is of a general nature and is not intended to address all issues or problems that might arise. Nor is it intended to be legal advice, which can only be rendered by a duly licensed attorney-at-law. Readers should consult with a lawyer if they have specific concerns that they feel are legal in nature. Neither Aon Association Services, including its parent and affiliates, nor The Hartford assume any liability for how this information is applied in practice nor for the accuracy of this information.

Balancing Act:

The Challenges and

Benefits of Volunteers

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December 2004

The Urban Institute

Volunteer Management Capacity Study Series

Balancing Act:
The Challenges and Benefits of Volunteers

Executive Summary

This report is the fourth in a series of briefs reporting on findings from a 2003 survey of volunteer management capacity among charities and congregations. The findings are based on conversations with a systematic sample of charities about their practices, challenges, and aspirations for their volunteer programs. The focus of this brief is the creation and use of a single measure of volunteer benefits and management challenges, a score we refer to as "net benefits."

Evaluation is a popular means by which nonprofit organizations, their funders, and their constituents can measure and demonstrate progress and effectiveness. Nonetheless, evaluation is not regularly conducted in most volunteer programs. "Net benefits" is a summary statistic that weighs the benefits of volunteer involvement against the problems that volunteer administrators encounter in recruitment and management. Net benefits is easy to calculate. As an evaluation tool, it lends itself to comparison and benchmarking across a variety of volunteer programs and sponsoring nonprofit organizations. Net benefits scores are highest when charities receive maximum public benefits from volunteers with few challenges in recruitment and management. Conversely, charities that report problems in these areas and few benefits from volunteers score low on the net benefits measure.

Investment in Volunteer Management Yields Higher Net Benefits. Two major dimensions of volunteer management capacity are adoption of a range of recommended management practices (such as screening and matching of volunteers to appropriate assignments) and employment of a staff member or a dedicated volunteer who can devote a substantial amount of time to the volunteer program. We learned that both are independently related to an organization's net benefits score. Organizations that had adopted more volunteer management practices had higher net benefits than organizations that had adopted fewer. Organizations with an identifiable coordinator had higher net benefits than organizations without such a coordinator. Both findings point to the value of investing in volunteer management capacity.

Organizations that Rely on Volunteers Report Higher Net Benefits. The role that volunteers play in an organization influences the net benefits score. Charities that use a lot of volunteers who spend a lot of hours with the organization report higher net benefits scores, as do charities that have a high volunteer-to-paid staff ratio. We also learned that charities benefit from giving volunteers a variety of options to contribute to the operations of the organization, ranging from direct service to bookkeeping to advocacy and fundraising. When charities use volunteers primarily for office tasks, net benefits scores are notably lower. In sum, charities that rely less on volunteers, or that give volunteers a narrow range of options to use their skills, score lower on net benefits.

Type and Size of Charity Have Little Influence on Net Benefits. The nonprofit sector is notably diverse, and two major hallmarks of this diversity are the wide-ranging missions and sizes of various charities. When it comes to net benefits from volunteers, however, type and size play a negligible role. While we found that human service organizations have slightly lower net benefits scores (on average), education, health, and arts organizations were virtually indistinguishable.

Our findings were similar when we looked for differences between organizations of different sizes. The smallest charities—those with less than $100,000 in annual expenditures—achieve higher net benefits on average, due partially to their greater reliance on and small-group relationships with volunteers. However, charities with little more than $100,000 in expenditures are hardly distinguishable from charities with multi-million dollar budgets. Resources are important, but money alone cannot buy benefits from volunteers.

The research shows that the cultivation of a well-managed volunteer program is important in maximizing the benefits and minimizing the challenges of working with volunteers. By investing in volunteer management capacity, charities can improve their net benefits scores.

The Volunteer Management Capacity Study

Surveying Charities about the Challenges and Benefits of Volunteers

The Volunteer Management Capacity Study was conducted by the Urban Institute in 2003, with the backing of the Corporation for National and Community Service, the UPS Foundation, and the USA Freedom Corps. It is the first national study of the strategies, challenges, and benefits of managing volunteers, providing a benchmark of needs and capacities of America's charities and congregations.

The results reported in this brief focus on the charities. We drew a sample of nearly 3,000 organizations that had filed Form 990 with the IRS in 2000. This list does not include the smallest class of charities, those with less than $25,000 in annual gross receipts. We conducted telephone interviews with volunteer administrators or executive managers in most of our sampled charities, asking them about the volunteer activities and management practices in their organizations, and the challenges and benefits that volunteers bring. Although members of boards of directors are important volunteers in virtually all charities, we asked respondents to exclude them when answering our questions about volunteers. We also asked respondents not to count special events participants unless the participants were organizers or workers at these events. The study does not include government agencies that involve volunteers, such as schools, libraries, parks, and prisons. Nonetheless, we believe that the project's findings can inform the operations of these kinds of agencies.

The final tally shows us that four out of five charities use volunteers in their operations. The results we present are based on those charities that engage volunteers; we exclude charities that do not use volunteers. As

"With the appropriate tools and benchmarks, volunteer administrators can measure and document their work in ways that justify additional support for their programs."

"Benefits from volunteers and challenges in managing them are two sides of the same coin. Knowing where an organization stands on these two issues says a lot about the organization."

we illustrate later in the brief, charities that involve volunteers in their operations are enthusiastic about the benefits that these volunteers bring to their organizations.

The fact that volunteers are seen as beneficial to charities is not surprising given that many organizations rely on them for daily operations or for the delivery of services. While volunteers may be incidental to the operation of some charities, others would be at a complete loss without them. However, the main purpose of our project was not to document the benefits of volunteers to charities. Rather, our main purposes were to establish a benchmark of the efforts charities go to in managing volunteers, the challenges they face in making good use of and providing good experiences for volunteers, and the prospects for increasing the capacity of charities to take on more volunteers. Benefits and challenges are two sides of the same coin. Charities benefit most when they overcome challenges of managing volunteers and are inspired to deal with challenges when volunteers provide critical benefits to the organization.

This brief is written with nonprofit managers in mind. Volunteer services directors can do their work better if they understand how management is related to overcoming challenges and tapping into the benefits of volunteers. Many funders and top-level administrators stress the need for evaluating services and demonstrating measurable outcomes, a demand that often eludes volunteer programs. However, with the appropriate tools and benchmarks, volunteer administrators can measure and document their work in ways that justify additional support for their programs. With investments come further benefits from volunteers.

Challenges of Volunteer Recruitment and Management

Recruitment of Volunteers, Management Capacity Are Key Issues

What challenges do charities face in recruitment and management of volunteers? We asked our survey respondents about nine different issues that had been identified by prior research and field experts. We asked whether each challenge presented a "big problem," a "small problem," or "not a problem." Figure 1 shows the nine issues and the extent to which charities identified each as a problem.

Despite concern that increases in volunteers stemming from President Bush's 2002 "call to service" could overwhelm the capacity of the nonprofit sector to accept them, we find that lack of supply of volunteers remains the pressing issue. The three most frequently cited challenges center on recruiting volunteers, with two in three charities saying that recruiting a sufficient number of volunteers is a problem. One in four charities say that recruiting volunteers during the workday is a big problem. When we asked charities whether having more volunteers than they could accommodate was a problem, comparatively few responded that this was an issue.

Other common challenges pertain to organizational capacity to accommodate volunteers. The most frequent "big problem" that charities face in managing volunteers is the lack of funds to support volunteer administration. Lack of paid staff time to train and supervise volunteers is a comparable concern. Taken together, the prevalence of these concerns indicates that building volunteer management capacity is a substantial challenge for most charities. Nearly half of charities say that absenteeism, unreliability, or poor work habits of volunteers are a problem, another indicator of low volunteer management capacity. That is, organizations that lack funds to support volunteer administration or to allocate sufficient paid staff time to train and supervise volunteers are more likely to experience such nonproductive behaviors.

The remaining challenges were seen as a problem by far fewer charities, although even one percent translates into problems for several thousand organizations. Five percent of charities consider regulatory, legal, or liability constraints to be a big problem. Fewer regard indifference or resistance on the part of paid staff or board members toward volunteers as a big problem (3%) or as a small problem (17%). However, these self-reports may reflect the difficulty of recognizing indifference, or the refusal of respondents to acknowledge their own resistance to new opportunities in managing and motivating volunteers.

Figure 1: Percentage of charities that cite various challenges as a big or small problem
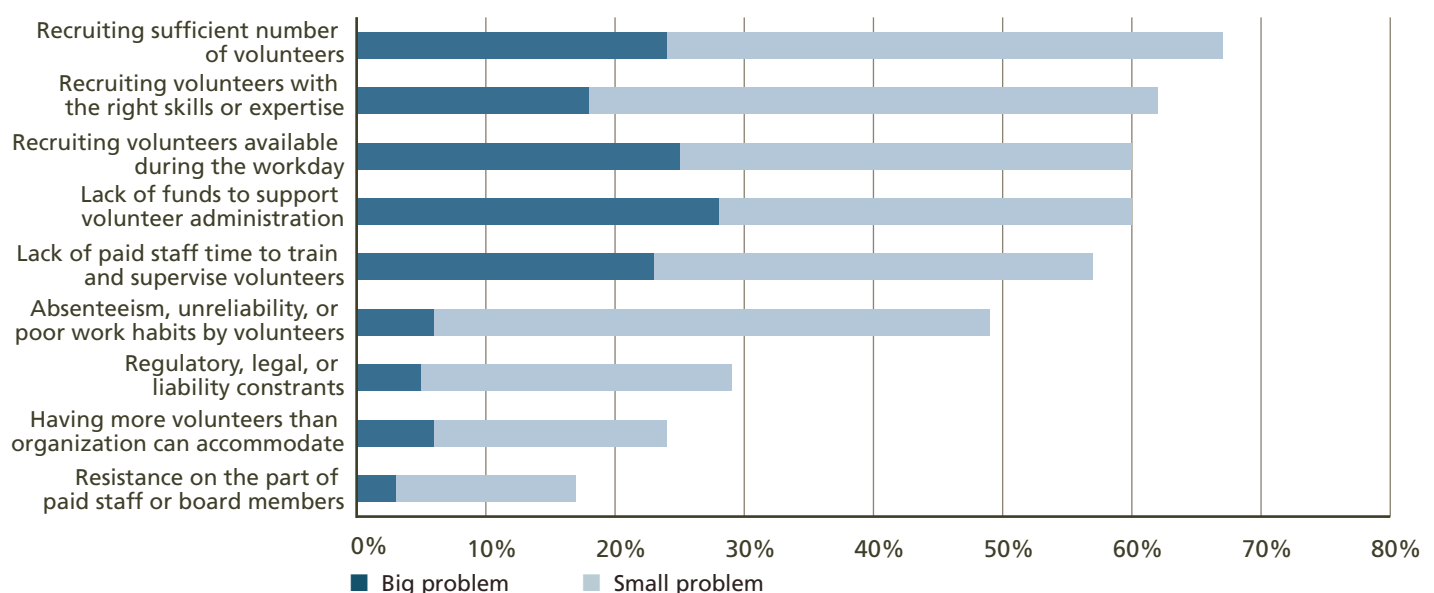
The Benefits of Volunteers

## Most Charities Believe Volunteers Are Very Beneficial to Their Operations

While charities in our study were vocal about the challenges they face in managing volunteers, they were also enthusiastic about the benefits that volunteers bring to their organizations. We asked them whether volunteers were beneficial to their operations to a "great extent," a "moderate extent," or "no extent." As indicated in figure 2, a majority of charities cited five of the six items as beneficial to a great extent. When including those charities that claimed benefits at only a moderate level, more than nine out of ten charities extolled the benefits of their volunteers. Fewer charities say they benefit from specialized skills possessed by volunteers, such as pro bono legal, financial, management, or computer expertise, yet three-quarters feel that such specializations provide at least a moderate benefit to their operations.

Many organizations experience particular combinations of benefits and challenges. Understandably, charities that report challenges in recruiting volunteers with special skills are less likely to say that they benefit from more detailed attention to clients. Charities that experience resistance from their board members or paid staff are less likely to say that they gain the benefit of increased public support for their programs, or improved community relations from volunteers. Charities that find regulatory, legal, or liability constraints to be a big problem are less likely to report that volunteers provide services or levels of service that their organization could not otherwise provide.

Adequate support for volunteer involvement is also related to benefits in interesting ways. For example, charities that have a problem allocating funds to support volunteer administration are more likely to tell us that volunteers help them to achieve cost savings, provide services or levels of services that their organization could not otherwise provide, and supply specialized skills. Similarly, charities that lack paid staff time to train and supervise volunteers are more likely to report that they benefit from the specialized skills of volunteers. When charities lack resources for their volunteer programs, they are more likely to turn to volunteers to help them save money, maintain (or expand) service levels, and access skilled workers—even if the lack of resources keeps organizations from investing in management of these volunteers.

Figure 2: Percentage of Charities that Feel Volunteers Are Beneficial to Their Operations
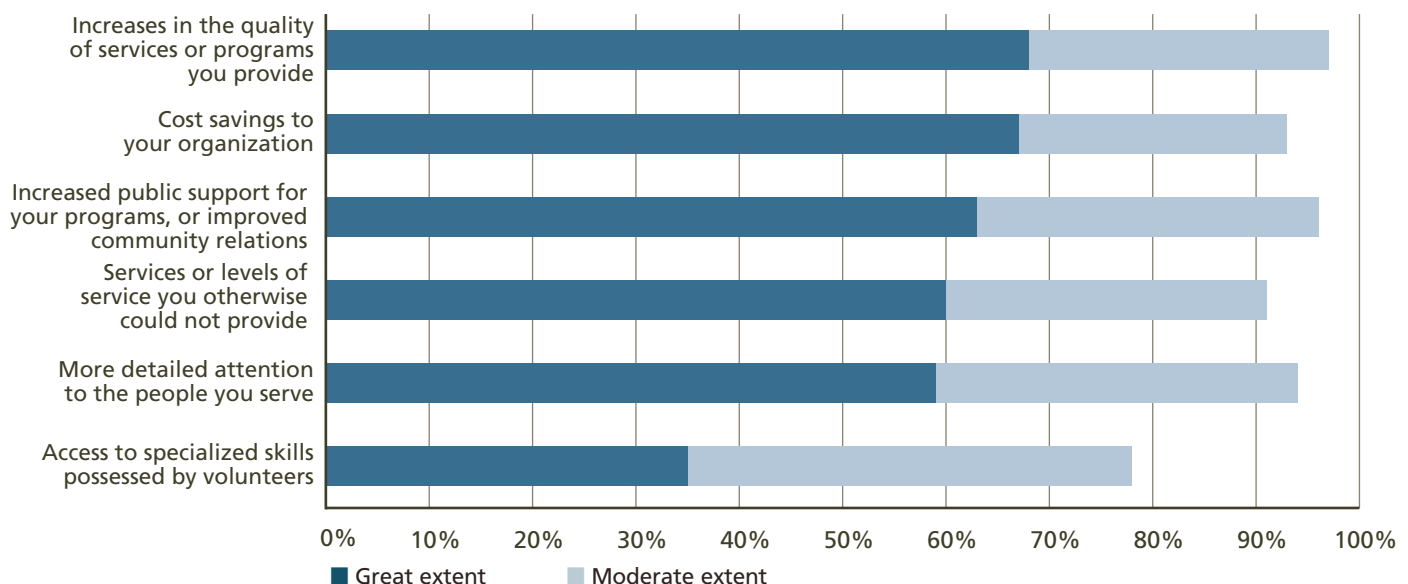
Net Benefits = Benefits – Challenges

Measuring the Balance between Payoffs and Problems

Looking at challenges and benefits of volunteers separately gives us important information about volunteer management capacity and the importance of volunteers to our nation's charities. However, it only tells part of the story. As noted before, challenges and benefits of managing volunteers are two sides of the same coin. Some organizations do not involve volunteers much in their operations, so they might experience both few problems and little overall benefit from volunteers. Other organizations might rely more on volunteers, experiencing both a greater array of challenges in recruitment and management of volunteers and greater overall benefits. The best possible situation for a volunteer-oriented charity is to invest enough resources so that it has both fewer challenges and greater benefits from its volunteers. The worst situation is when a charity experiences a full array of problems and gets nothing in return for its efforts.

To compare organizations on both the challenges and benefits items, we combined the challenges and benefits into a single measure. The result is what we call **net benefits**, or the benefits of volunteers when the costs of dealing with recruitment and management challenges are taken into account. The way we calculate this measure is detailed on the following page, where you can calculate the score for your own organization. The important feature to keep in mind is that net benefits are highest when charities derive maximum benefits from volunteers and do not suffer from common problems associated with low volunteer supply or low volunteer management capacity. Net benefits are lowest when charities get no benefits from volunteers, but exhibit the full range of problems in recruiting and managing volunteers and engaging their staff in productively working with them. Mixtures of challenges and benefits result in scores that fall between the extremes.

"Net benefits of managing volunteers is the value of the benefits that volunteers bring to the organization when the costs of dealing with recruitment and management challenges are taken into account."

"Net benefits are highest when charities get maximum benefits from volunteers without the common problems associated with low volunteer supply or low volunteer management capacity."

The calculation of net benefits helps to alleviate the problem of only counting the benefits of volunteers (as many studies do) without taking into account the challenges that may also stem from their involvement. The worksheet on the following page shows how to combine into a single measure of net benefits the value that volunteers may bring to the organization and the recruitment and management challenges they may pose. These benefits and challenges (and the resulting net benefits score) do not pertain to volunteers, per se, but to how charities involve them. That is, in and of themselves, volunteers do not promise advantages or problems. Rather, organizational preparation and management of volunteers is key to maximizing benefits over challenges. This is the key concept of volunteer management capacity. Some charities perform this function better than others, so we would expect them to differ in achievement of net benefits. On pages 10 and 11, we examine statistically the effects of volunteer management capacity on the net benefits of volunteers.

The challenges and benefits that we used in our study are not the only ones that can result from involving volunteers in charities. Based on our review of the literature, however, they are the most common benefits and challenges that volunteer programs encounter. The advantage of focusing on a specific set of common challenges and benefits is that organizations that were not in the study can see what is typical for the sector, and how they stack up against these "norms" or "benchmarks." So, you can not only calculate your own net benefits score on page 6, but you can see how your score compares to other like organizations by looking at the figures on pages 7 through 9.

Net Benefits Worksheet

Calculate Your Organization's Net Benefits Score

To what extent do volunteers provide benefits to your organization? (Check the appropriate box)

	Great extent	Moderate extent	Not at all
Cost savings	☐	☐	☐
More detailed attention to the people you serve	☐	☐	☐
Increased public support for your programs, or improved community relations	☐	☐	☐
Increased quality of services or programs you provide	☐	☐	☐
Capability to provide services or levels of services you otherwise could not provide	☐	☐	☐
Access to specialized skills possessed by volunteers, such as legal, financial, management, or computer expertise	☐	☐	☐
Add up number of checks:	☐	☐	☐
(get out your calculator!)	x2.666	x1.333	x0

Benefits Index: [ ] = [ ] + [ ] + [ ]
Box A

[Box A: Benefits] − [Box B: Challenges] = [Net Benefits]

To what extent are the following issues a problem for your organization? (Check the appropriate box)

	Big problem	Small problem	Not a problem
Recruiting sufficient number of volunteers	☐	☐	☐
Recruiting volunteers with the right skills or expertise	☐	☐	☐
Recruiting volunteers available during the workday	☐	☐	☐
Indifference or resistance on the part of paid staff or board members toward volunteers	☐	☐	☐
Lack of paid staff time to properly train and supervise volunteers	☐	☐	☐
Lack of adequate funds for supporting volunteer involvement	☐	☐	☐
Regulatory, legal, liability constraints on volunteer involvement	☐	☐	☐
Volunteers' absenteeism, unreliability, or poor work habits or work quality	☐	☐	☐
Add up number of checks:	☐	☐	☐
	x2	x1	x0

Challenges Index: [ ] = [ ] + [ ] + [ ]
Box B

Why are the benefits multiplied by 2.666, or 1.333? We want challenges and benefits to have equal weight in our net benefits calculation. However, we have eight challenges and only six benefits. Giving more weight to the benefits items brings them up to equal total influence with the challenges items.

While we presented nine different challenges in figure 1, our measure of net benefits only includes eight challenges. The challenge of having more volunteers than the organization can accommodate is different from the others because it is a positive problem—that is, a problem that many other organizations would like to have. Since our net benefits measure subtracts challenges from benefits, we left out the "problem" of having too many volunteers.

How Net Benefits Differ by Organizational Characteristics

Compare Your Score with Organizations Like Yours

Net Benefits and Size of Organization. The next three pages explore how net benefits from volunteers are influenced by different organizational characteristics. For example, the size of a charity usually has a notable influence on its operations. For this reason, small charities like neighborhood associations, and large charities like universities and hospitals, are usually separated in analyses like ours since the difference in their size is such an important defining characteristic. Figure 3 shows the average net benefits score for charities in five different categories of annual expenditures, ranging from small charities with less than $100,000 in spending to large charities with budgets of over $5 million.

We were surprised to learn how little influence organization size has on net benefits from volunteers. Charities with between $100,000 and $500,000 in annual expenditures do not differ significantly from organizations in larger size classes. Only the smallest charities, those with less than $100,000 in annual expenditures, have significantly higher net benefits scores, on average. Two things may explain this difference. One is that several challenges are less relevant to this size class. For example, small charities may have few or no staff members to train, are less likely to use volunteers in specialized tasks, and are less likely to carry out activities that might cause them to confront regulatory constraints. This reduces

their overall measure of challenges, resulting in higher net benefits scores. Another reason that the smallest charities have higher net benefits is because they tend to rely more heavily on and report greater benefits from their volunteers.

Net Benefits and Scope of Volunteer Use. In previous briefs, we described a measure of "scope of volunteer use" that takes into account both the number of volunteers that charities engaged in the past year as well as the number of hours that volunteers collectively worked in a typical week. Dividing charities into categories of "many volunteers" and "few volunteers" and "many hours" and "few hours" results in a cross-classification of four categories that indicate how an organization uses its volunteers. Charities that engage many volunteers for many hours each week have the largest scope of volunteer involvement. Charities that use many volunteers for few hours reflect episodic use of volunteers, while charities that use few volunteers for many hours indicate organizations that have sustained relationships with their volunteers.

We know from our previous work that charities with a large scope of volunteer use typically make the greatest investments in volunteer management capacity. Therefore, we were not surprised to learn that these organiza-

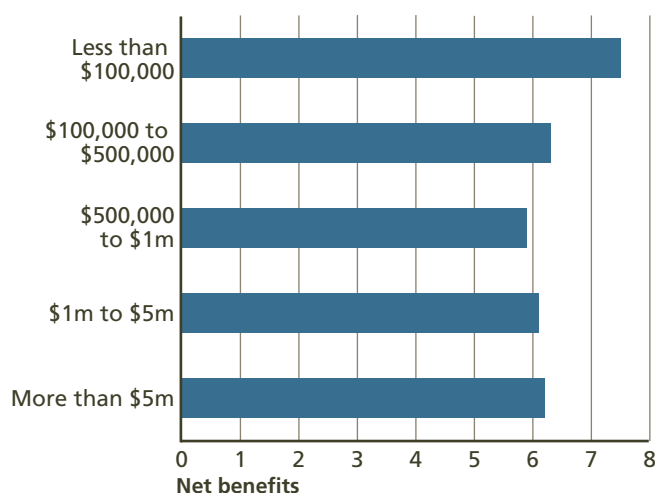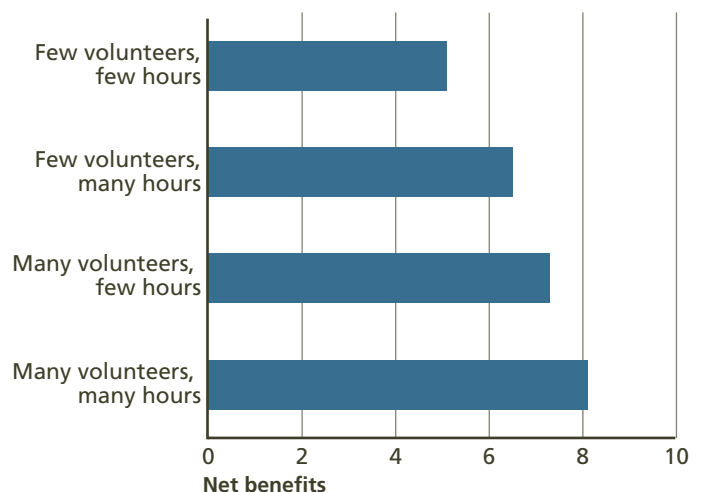**Figure 3:** Average net benefits of volunteers by organizational size

Figure 4: Average net benefits of volunteers by scope of volunteer use

tions derive the highest net benefits scores, on average. However, we expected that charities that have sustained relationships with volunteers would have higher net benefits than charities that focus on episodic volunteers. This is not the case. Figure 4 shows that charities with episodic use of volunteers have a slightly higher average net benefits score than charities with sustained relationships with volunteers, although the difference is not large enough to safely conclude that the categories really differ.

Net Benefits and Number of Volunteer Assignments.

Different volunteers have different interests and ways they can contribute to charities with which they volunteer. Charities can derive more benefits from volunteers if they arrange for volunteers to perform a variety of functions in the organization. We asked charities whether or not volunteers were involved in six specific functional areas: delivering of services; fundraising; providing general office services; providing professional legal, financial, management, or computer assistance; managing other volunteers, or advocacy. Ten percent of organizations said that their volunteers did none or only one of these things. Twelve percent said volunteers had all six assignments.

We grouped the number of assignments into three categories, as illustrated in figure 5. We then calculated the average net benefits score for each group. We learned that the practice of using volunteers in a variety of assignments is positively related with net benefits of volunteers. Even though charities that use volunteers in various assignments incur greater demands on management and greater challenges, they have done

more to overcome these challenges and derive greater benefits from volunteers.

Net Benefits and Adoption of Volunteer Management Practices.

Figure 6 documents the direct relationship between greater adoption of volunteer management practices and net benefits from volunteers. We asked respondents about their adoption of nine "best practices" in volunteer management, including regular supervision and communication with volunteers, liability coverage or insurance protection for volunteers, regular collection of information on volunteer numbers and hours, screening and matching of volunteers to assignments, written policies and job descriptions for volunteers, recognition activities, annual measurement of impacts of volunteers, training and professional development opportunities for volunteers, and training for paid staff in working with volunteers.

To determine whether greater adoption of management practices is related to net benefits, we summed the number of management practices that each charity said that it had adopted to a large degree. We then grouped charities into categories as represented in figure 6, ranging from 28 percent of charities that have adopted none or only one practice to a large degree to 6 percent of charities that have adopted eight or all nine practices to a large degree.

As illustrated, large-degree adoption of greater numbers of management practices is related to higher net benefits scores. While we show five groups in figure 6, three might be sufficient. Adoption of none or one management "best practice" results in scores that are signifi-

Figure 5: Average net benefits of volunteers by number of assignments available to volunteers
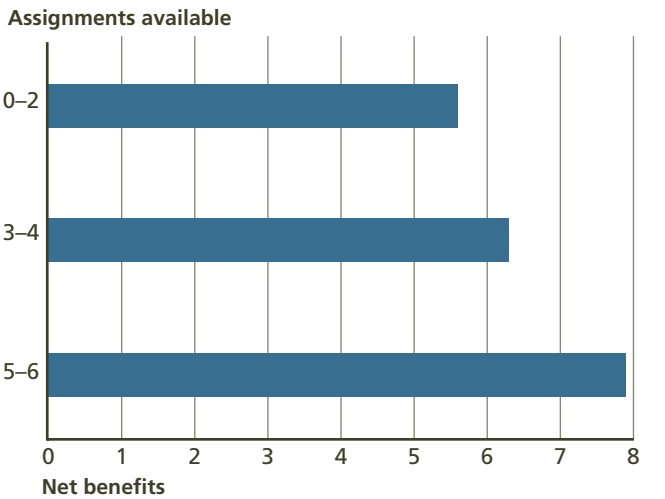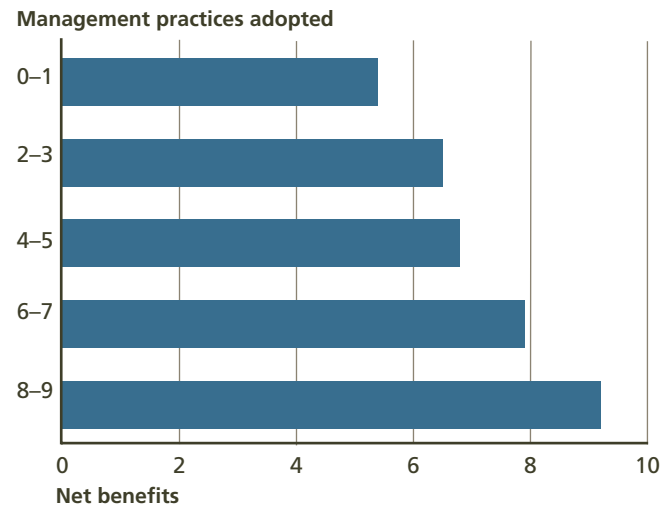
Assignments available

Net benefits

Figure 6: Average net benefits of volunteers by number of recommended volunteer management practices adopted to a large degree

**Management practices adopted**

Net benefits

cantly lower than charities that have adopted more management practices. However, adoption of two to three practices is not statistically different from adoption of four to five practices, and adoption of six to seven practices is not statistically different from adoption of eight to nine practices. The number of practices adopted is only part of the story, however. The questions of which practices matter most for net benefits and how much they matter are ripe areas for future research.

Net Benefits and Volunteer Coordinators. Adoption of good practices in managing volunteers is only one dimension of volunteer management capacity. Another dimension is investment in a paid staff person who can spend a substantial portion of time on volunteer management duties. We asked respondents if their charity had such a staff person, a volunteer who manages other volunteers, or neither. If the charity had a paid staff person who manages volunteers, we asked how much of this person's time was devoted to volunteer management.

Figure 7 shows how volunteer management coordinators influence net benefits from volunteers. Unsurprisingly, not having a volunteer coordinator is associated with the lowest average level of net benefits. Also not surprising is the finding that net benefits from volunteers increases as paid staff members devote more time to volunteer management. On the other hand, we were surprised to observe that charities that use unpaid volunteers in the volunteer management role have net benefits just as high as charities that have paid volunteer coordinators who spend a substantial amount of time on volunteer management. This finding deserves greater study, although it does suggest that a committed unpaid coordinator can be as effective as a paid staffer, at least in some organizations. We hypothesize that unpaid coordinators have what Susan Ellis has called "the luxury of focus." That is, unpaid coordinators are able to focus on their volunteer tasks without the distraction of other organizational needs. In contrast, most employees have at least one other role in addition to their volunteer management role, and all roles suffer to some extent due to lack of attention. As a result, unpaid coordinators generate net benefits from volunteers just as well as paid staff coordinators who spend a lot of time on volunteer administration. Further, unpaid coordinators may have a special rapport with other volunteers, thereby improving the experience and performance of the volunteer program.

Net Benefits and the Roles Volunteers Play. Another issue we considered is whether the primary use of volunteers makes a difference. We asked respondents to give

Figure 7: Average net benefits of volunteers by presence of paid coordinator and time spent in volunteer management
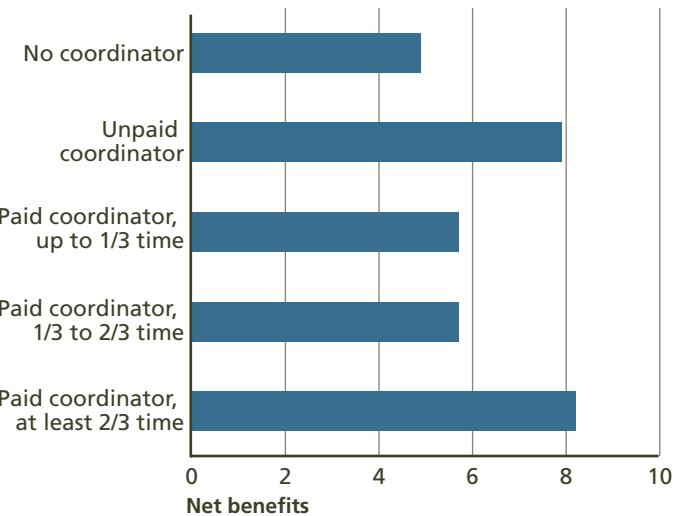
us a brief description of the one main role volunteers perform in their organization. We divided the responses into four categories: direct service; indirect service (where volunteers carry out services, but do not come into contact with those served); internal administrative tasks (such as general office work); and external administrative tasks (such as public relations). Our main finding is that charities that use volunteers primarily in internal administrative roles derive lower net benefits scores than other charities. This is not surprising given that our questions about benefits were geared primarily toward organizations that involve volunteers more actively in direct contact with those that the organization serves.

Net Benefits and Young Volunteers. We also explored whether the predominant age of volunteers influences net benefits. We observed in an earlier brief that reliance on volunteers under age 24 results in lower retention rates, possibly because young people are more transient and therefore less likely to maintain relationships with the charities in which they volunteer. Our exploration of net benefits reveals that charities that rely predominantly on volunteers under age 24 have lower net benefits scores. However, rather than a criticism of young volunteers, this finding may reflect the inability of some charities to craft assignments that tap into the talents of young people, or a tendency of organizations to focus on what youth "can't do" rather than what they can. Young volunteers present both unique challenges and opportunities for charities.

A Multiple Variable Analysis of Net Benefits

What Factors Explain Which Charities Attain the Highest Levels of Net Benefits?

On the previous three pages, we showed how various individual organizational characteristics are related to net benefits of volunteer involvement. The next two pages consider how these factors, taken together, affect net benefits scores. Are some of the factors more important than others in achieving benefits from volunteer involvement? A key feature of our approach is that all of the factors are considered at the same time, so that the influence of one characteristic takes into account all the other factors in the analysis. We divided the explanatory factors into four categories: volunteer management, extent of volunteer involvement, type of volunteer involvement, and various other organizational characteristics. Figure 8 illustrates the results.

Volunteer Management. We measure investment in volunteer management in two ways: extent of adoption of management practices and the presence of a volunteer coordinator.[1] The findings strongly support the contention that volunteer management positively impacts the benefits gained from volunteer involvement. To the degree that charities have fully adopted more of the practices for volunteer management recommended in the literature on volunteer administration, they are more likely to achieve higher net benefits. Having a coordinator for volunteers, too, is related to the attainment of greater net benefits from their involvement, although not quite so sharply. Although both volunteer management practices and the presence of a coordinator have a positive relationship with the net benefits of volunteers, development of capacity through adoption of volunteer management practices is more important than having a volunteer coordinator. On the other hand, a coordinator may be a critical component of implementing most management practices.

Extent of Volunteer Involvement. We measure extent of volunteer involvement in two ways: the scope of volunteer use and the number of different ways volunteers can contribute to an organization.[2] Scope of volunteer use has the stronger influence in the analysis. That is, larger scope of volunteer use is strongly tied to higher net benefits, even when measures of management

capacity are taken into account. Similarly, the greater the number of different assignments available to volunteers, the greater the net benefits the organization is likely to attain. Involving volunteers in a range of different organizational operations, rather than being confined to just one or a few options, yields higher net benefits to the charity.

Type of Volunteer Involvement. Regardless of the extent or amount of volunteer activity in a charity, the organization can deploy volunteers in a variety of ways. The type of activity in which volunteers are primarily involved, as well as the demographic characteristics of those volunteers, make a difference in the net benefits of volunteers. Regarding the first of these factors, we noted on page 9 that charities that involve volunteers primarily in internal administrative roles had lower net benefits. Our analysis in figure 8 compares charities that use volunteers primarily in internal administrative roles versus charities that use volunteers primarily in other ways. Controlling for other factors in the analysis, the result holds up. The finding suggests that giving volunteers more opportunity to interact with clients or others in the community can be beneficial to charities.

Our observation about the challenges of young volunteers led us to consider this issue in the multivariate analysis as well. Figure 8 illustrates the negative relationship between the percentage of volunteers that are under age 24 and net benefits from volunteers. Younger volunteers are less accustomed to the workplace (volunteer or paid) and require greater supervision; they have less background, experience, and technical skills to contribute; they turn over more quickly due to more frequent changes in life circumstances. Therefore, organizations that target this group or rely on them for volunteers tend to have more challenges and fewer overall organizational benefits. This finding does not mean that charities should refrain from recruiting younger volunteers. Rather, they should be aware, as well as realistic, that the benefits and challenges from these volunteers will differ from their experiences with working with volunteers with greater life and employment experience.

Organizational Characteristics.[3] The net benefits gained by charities from volunteers also depend on the demographic characteristics of the organization. The negative influence of size in figure 8 reinforces our observation in figure 3 that smaller charities derive greater net benefits than larger charities. A preliminary analysis indicated that charities operating in the human service subsector had lower average levels of net benefits than charities operating in other subsectors, such as health, education, and the arts. Figure 8 documents this finding. Although the survey did not provide any information to help explain this result, we speculate that the breadth of this subsector; its direct service activities with clients of a great variety of backgrounds, situations, and goals; and the high demand for these services may make it particularly difficult for charities in the human services to achieve high levels of net benefits.

Finally, we considered the relative dependence of the charity on paid staff versus volunteer personnel. We expected that those organizations that rely more heavily on volunteers rather than on paid staff would garner greater benefits from volunteers. Figure 8 indicates that relative dependence on paid staff versus volunteer personnel has one of the largest effects on the net benefits of volunteers. As expected, the relationship is negative: organizations that have high dependence on volunteers

are more likely to reap greater net benefits from their involvement. By contrast, those organizations with lesser dependence on volunteers tend to derive lower net benefits from volunteers.

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[1] Adoption of management practices is measured by our management index. For each of the nine management items described on page 8, no adoption contributes a value of 0, some degree of adoption contributes a value of 1, and large degree of adoption contributes a value of 2; the management index ranges from a value of 0 to 18. Presence of volunteer coordinator takes on a value of 1 if the charity has a paid or unpaid coordinator, and a value of 0 for no coordinator.

[2] Scope of volunteer use is measured differently than the four-category cross tabulation we described on page 7. In the current case, we divided number of annual volunteers into seven categories, ranging from none (0) to over 1,000 volunteers (6). We likewise divided number of total volunteer hours in a typical week into seven categories, ranging from none (0) to over 1,000 hours (6). We multiplied the two measures together, resulting in a measure of scope ranging from 0 to 36. Number of volunteer assignments is measured as described on page 8, ranging from 0 to 6 different total assignments in each charity.

[3] Size of charity is indicated by the five size groupings in figure 3. We define the human services subsector as those direct services charities in the National Taxonomy of Exempt Entities that fall in categories of crime and legal related; employment; food, agriculture, and nutrition; housing and shelter; public safety, disaster preparedness, and relief; recreation and sports; youth development; and social services. Different from our measure of staff reliance that we used in an earlier brief, our current measure is the ratio of value of staff time to value of volunteer time. The numerator is dollars spent on staff compensation and wages, as reported on Form 990. The denominator is number of volunteer hours times the respondent's estimated dollar value of a typical volunteer.

Figure 8: The Influence of Management, Volunteer Involvement, and Other Organizational Characteristics on Net Benefits from Volunteers
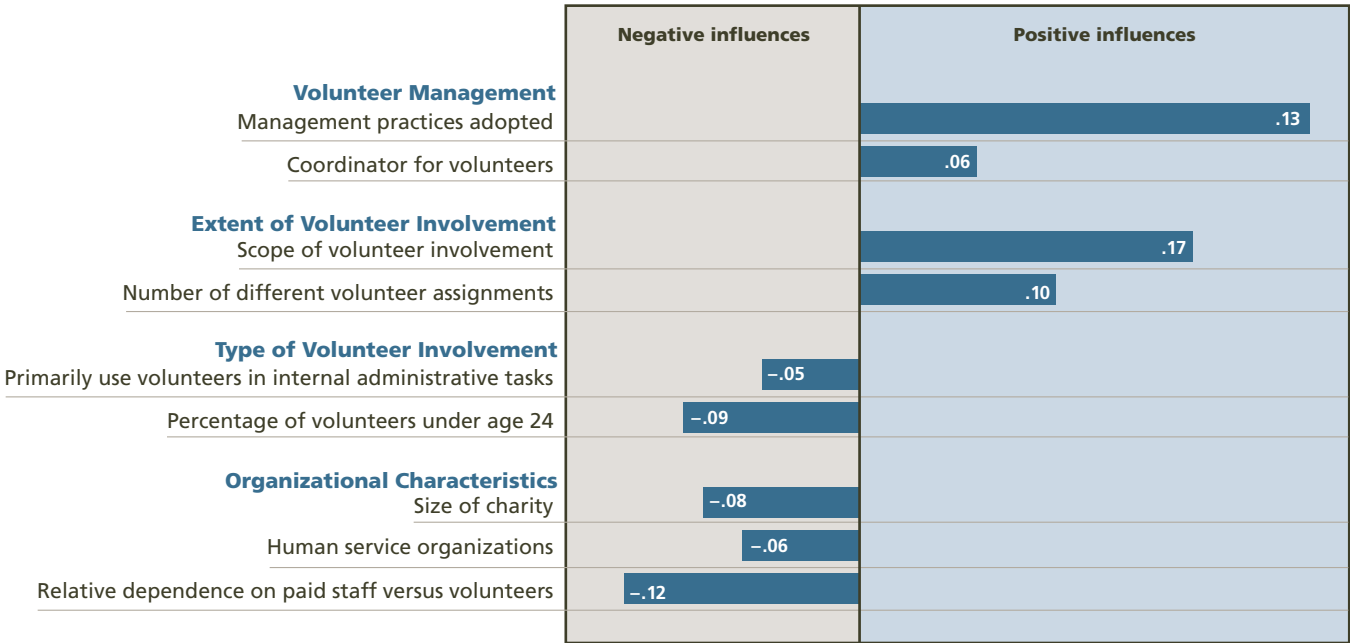
Note: Multiple regression, model adjusted R^2 = 0.154; magnitudes of bars are standardized betas; all variables are statistically significant at $p < 0.05$, except for the effect of human service organizations, $p < 0.07$.

Concluding Observations

Implications for Practice

Why Measure Net Benefits? In this brief we have introduced a new tool for the evaluation of volunteer involvement in charities: net benefits, or the difference between the benefits that volunteers bring to charities and the challenges that recruitment and management of this resource bring to the organization. Outcomes measurement and program evaluation are making inroads in the nonprofit sector. Due partly to the demands of funders and partly to the value that evaluation brings to effective management, more nonprofits are spending time defining and measuring their activities. While individual volunteer duties defy direct comparison across different organizations, common elements in volunteer administration and the benefits that volunteers bring to nonprofits lend themselves to measurement and comparison. Systematic measurement and comparison are valuable both for gauging progress over time and for determining where volunteer programs stand in relation to peer organizations. "Net benefits," or other measures like it, provide the opportunity to measure and benchmark major dimensions of a volunteer program.

Management Matters. In working to achieve the most favorable balance of benefits over challenges, management matters. Management of volunteers is a balancing act. We show that charities that have implemented more of the recommended or "best" practices for managing volunteers typically realize higher net benefits scores. Similarly, those organizations that have a coordinator who devotes substantial attention to volunteer administration are rewarded with high net benefits scores. In other briefs, we have referred to the adoption of volunteer management practices and the presence of a volunteer coordinator as the two major dimensions of "volunteer management capacity." In sum, organizations that invest in volunteer management capacity are more likely to attain high net benefits.

Investing in Volunteers. Management is not the only thing that matters, however. Also important is investment in volunteers, including giving them responsibility for a greater array of tasks. Charities that have high levels of volunteer investment realize higher net benefits, on average, than those that have more constrained volunteer use. Organizations that limit their volunteer use primarily to internal administrative tasks reap fewer net benefits than charities that entrust to volunteers larger roles in external and client-related activities. Investment in volunteers leads to higher net benefits, which in turn leads charities to make an even greater investment in their volunteers.

Resources or Will? Because larger organizations tend to have more management capacity and greater scope of volunteer use, we initially speculated that they would display higher net benefits from volunteer involvement. However, the survey respondents tell us that size matters little when it comes to benefits and challenges, and that smaller charities are a bit more successful in realizing net benefits.

Some organizational characteristics are harder to change than others. For example, a charity cannot easily change its service area, or its size, even though some service areas and some size categories seem to lead to higher net benefits from volunteer involvement. Similarly, no one would advise a charity that involves youth to change its ways simply because it is more difficult to achieve high net benefits with a large percentage of volunteers under age 24. Some other factors associated with net benefits are more expensive to charities than others, such as employing a paid coordinator of volunteers. By contrast, charities can adopt a range of volunteer management practices, change the ways that they involve volunteers, or vary volunteer assignments much more easily. If the goal is to achieve a better balance of benefits over challenges of volunteer involvement, all charities can do something, and with good effect. To us, the message is clear: regardless of size, charities that are willing to invest in volunteer management capacity and to trust volunteers with a greater role are more likely to reap the rich harvest of these valuable human resources.

Volunteering Today

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United Way
United Way of King County

THE CHANGING PARADIGM

Volunteer's	OLD PARADIGM	NEW PARADIGM
Motivations Volunteer's Pattern	Civic Duty	Improve the world and find personal fulfillment
of Volunteering Volunteer's Anatomy	Long-team and regular	More short-term and sporadic
	Limited; volunteers expected not to deviate from preset guidelines and procedures	Increased; volunteers more active in developing their own opportunities and in decision making
Volunteer's Expectation of Reward	Low; seek mostly recognition/appreciation; some expense reimbursement	Higher; seek recognition/appreciation, expense reimbursement but possibly also cash-equivalent or cash incentives
Volunteer's Relationship to the Organization	Strong identification; conforming and loyal	Loose identification; more individualistic and critical; more likely to walk if unsatisfied
Volunteer Manager's View of the Volunteer	Volunteer is subordinate	Volunteer is a partner
Volunteer Manager's Management Style	Command and control; top-down; volunteer manager as "expert"	More participatory; volunteers have input and influence over decisions; volunteer manager as "team leader"
Interviewing & Placement Process	Priority on organizational needs; limited knowledge of volunteer; some skill assessment	Better balance between organizational and volunteer needs; more thorough assessment process; focus on whole person
Volunteer Opportunities Offered	Limited choice; mostly long-term and unskilled	Wider choice; greater diversity in respect to type of work; required time commitment, skill level and intensity

Developing Compelling Opportunities for Baby Boomers
Temple University's Center for Intergenerational Learning Training Network

United Way — United Way of King County

TREND	DISCUSSION POINTS/FACTORS	POSSIBLE IMPLICATIONS
Youth	Significant increases due to civic involvement but also in response to more schools mandating service hours for graduation	Supervision and liability issues Positions that are interesting, build skills After-school, weekend, summer
Families	Due to time factors, in order to volunteer, many will want to combine with family time	Weekend and evening positions Small group projects Positions appropriate for all ages
Mandated Volunteers	Court-ordered, unemployed, welfare to work	Supervision and Screening Limited timeframe Morale (free will vs coercion issues)
Corporate	Companies see the public relations, morale and profitability benefits of corporate sponsored volunteer programs.	Group projects - high organization Location - can job be done at company.? Pressure to create positive experience due to funding implications Leadership opportunities
Technology	Communication via e-mail, home computers, recruitment via websites	Location of job – virtual volunteers? Staff knowledge/technology requirements
Generation X	Increased diversity (class of 2000 70% white 30% people of color,) increased education, like options, socializing opportunities, skill development, highly skilled in technology	Inclusive recruitment, screening & training Group/Social opportunities Range of commitment levels Offer skill development see technology above
Generation Y	Next largest cohort behind boomers Volunteering in large numbers The Next "Civic" generation? Want meaningful work, flexibility Work/ life balance important	Need to engage in meaningful work Provide flexible schedules Want to volunteer with friends
Baby Boomers	Large demographic, historically most volunteering occurs in middle age	Flexibility in hours as most work Short-term projects Leadership opportunities
Groups	Volunteering both one-time and on-going	Strong project development & management skills needed Tracking implications Social activities
Work	Increases in work shifts as result of global economy, an increase in evening workers	Opportunities for day hours Connect w/ companies with evening shifts
Women	National Foundation for Women Business Owners reports - 80% of female business owners volunteer to aid charities. 50% of working women volunteer for more than one charity.)	Flexible hours see above under Families, Baby Boomers, Corporate, etc.
Skills-Based Volunteering	More and more volunteers wanting to volunteer their skills and experience	VPM in talent management role. Develop new management style.

1

Six Generational Trends that *Will* Affect Your Nonprofit

From Vince Hyman, Publishing Director, Fieldstone Alliance:

The pace of change today feels alternately exhilarating and wearying. And yet, if the thought leaders, executives, board volunteers, and foot soldiers in the nonprofit community don't keep on top of change, they'll be left behind.

This issue of *Tools You Can Use* is adapted from Chapter 2 of our book by Peter C. Brinckerhoff, *Generations: The Challenge of a Lifetime for Your Nonprofit*. If you've not met or heard or read something by Peter you've missed some great stuff. He has won two of the Alliance for Nonprofit Management's prestigious McAdam Awards; he is a regular conference speaker, and he is author of many books (including our own award winning *Nonprofit Stewardship*, and the Mission-based Management Series, available on his popular web site, MissionBased.com.)

Generations is an in-depth analysis of the change the nonprofit community is undergoing as it prepares to retire its Boomer generation (which largely built the nonprofit sector and still runs its largest institutions). In this issue of *Tools,* we'll identify the generations and note how they influence and interact with the major trends that *should* be shaping your organization—from its fundraising plan to its vision statement to its board of directors roles and more.

Who We're Talking About: Five Generations Defined
Five generations are influencing the board, staff, and service functions of nonprofits and foundations today:

- The Greatest Generation, (born 1901–1925)
- The Silent Generation (born 1926–1944)
- The Boomers (born 1945–1962)
- GenX (born 1963–1980)
- Gen@ (born 1981–2002)

The population of those in the Greatest Generation and Silent Generation is rapidly diminishing—though it should be noted that, in addition to their incredible contributions, these are the people who developed much of the administrative science that influences the management of organizations.

However, it is the Boomers who have lead the development of the nonprofit community. Over the next fifteen years, that generation will retire from its dominance in both for-profit and nonprofit jobs.

Boomers will start second careers, hand over their jobs in the administration of foundations and nonprofits, begin volunteering, and begin to suffer from expensive health problems that often accompany aging. They will become major consumers of the nonprofit services they once delivered or provided grants for.

Meanwhile, the oldest GenXers are taking their place as leaders of the social sector, and the younger cohort of Gen@s are entering the workforce. Both of these groups grew up with very different sets of expectations than those that shaped their Boomer parents.

Here's what we can expect as this transition unfolds over the next fifteen years, according to Peter's research:

- Financial stress
- Technological acceleration
- Diversity of population
- Redefining the family
- MeBranding
- Work-life balance

Let's look at each.

Six Trends That *Will* Affect Your Nonprofit

1. Financial stress
Generational change will have major financial implications. First, the impending retirement of the Boomers is going to stress the social safety net as never before. This generation, sometimes known as the "Me Generation" for its self-centeredness, is likely to demand more than its forerunners, and have the population clout to get what it wants.

- Government money will continue to move toward issues of importance to Boomers.
- Boomers will start drawing money out of their retirement funds soon, affecting the stock market, banking, and other financial institutions. Predictions on the consequences of this vary wildly—with the only agreement being that the consequences will be very, very large.
- Continuing federal deficits and the huge federal debt will trim the amount of money left for needed social, economic, educational, health, and environmental efforts.

There's likely to be a big squeeze coming.

2. Technological acceleration

The dependence on and expectations regarding technology are only going to grow at an increasing rate. Some of us recall dial phones, carbon paper, correspondence by mail, and waiting weeks for a precious mail order package. Compare that to today's practice: you type up, save, and file notes as you conduct a business call; answer urgent e-mails from staff, board members, spouse, aging parents, and children; and maybe browsed online for a pair of running shoes—*at the same time*.

Such rapid transactions blur work life, home life, and social life as never before. It is wonderful—when it works. But when technology fails, it is disastrous. Just look at what happened in the aftermath of Hurricane Katrina in the U.S. Gulf states in 2005. A key element of the federal, state, and local response plans was the use of cell phones by rescue and response personnel. When the entire cell system in two states went down, people were completely cut off.

Today, in the administration of foundations and nonprofits, in our nonprofit business plans and in our strategic plans, we scale up based on this ability to process so many transactions and clients rapidly or automatically. Often this brings about increased economies, and just as often it brings risks of technological failure or less-than-courteous treatment of those we work to serve.

The most important trend that's resulted from technological change is *the expectation that we are available and reachable twenty-four hours a day, seven days a week.* Boomers may grow weary of this, especially as they age. But it is the air that many members of GenX and Gen@ breathe. The tension between expectations and capacity creates real problems among staff of varying technological proficiency, and with clients of diverse ages and expectations.

3. Diversity of population

Gen@ is the most diverse generation ever. That is the generation-specific outcome of a much larger national trend—a much, much more diverse population. In the United States, the Hispanic population, because of both immigration and higher birth rates, is growing at twice the national rate. Sometime in this century Caucasians in the United States will become a minority. Immigration from every corner of the globe continues to swell our population. This is causing some major rethinking for policy makers on a national, state, and local level.

Population diversity is an issue for all nonprofits, not just those in urban areas, or on the coasts or the southern U.S. border. In addition to traditional concepts of racial diversity, other things are going on. More diverse communities lead to more diverse romances. Interracial marriages in the United States are at an all-time high, and the children of these marriages are facing all kinds of questions about

cultural identity and where they "belong." Self-identity, cultural competence, family traditions, and related cultural identifiers are all in flux.

Expect this trend to continue, and to continue to change in its shape, scope, and direction. For example, the influx of highly educated and skilled workers from India to the United States has changed. Once a highly desirable destination for physicians, engineers, and graduate students, the United States is now seen as less desirable. Why? Because India has raced into the twenty-first century, become more politically stable, and developed a booming economy. Jobs abound for the well trained, educational opportunities are growing, and thus, in 2003 for the first time, the migration flow of Indians between the United States and India *was back to India,* not toward the United States.

4. Redefining the family

Regardless of political definitions of "family," nonprofit service providers have to deal with what families *are* today and prepare for what families *will become* in the future. First, families are more mobile, and in new ways. Over the past twenty-five years—within the past two generations—we have seen an unprecedented spreading out of families, and here's the key: *the higher the education level, the more likely this is.*

Communications and cheap transport has enabled long-distance families to maintain their ties—a good thing, given the trend. But this trend has changed the long-term, multigenerational commitment to a particular community *and its nonprofits.* It has shortened the time needed (at least in many communities) to become accepted. It has changed the need for day care—if grandma is 400 miles away, you can't drop the kids off. It has increased the need for the famous "village" to help raise our children. And as a society, we've not yet figured out the ultimate impact of all of this, let alone how to deal with it.

Second, there's a major change in the nature of family itself. With more divorces and remarriages, the number of "steps" in any given house (stepbrother, stepfather, and so forth) has exploded. No one knows the implications of this (whether it is bad, good, or neutral is the subject of fierce and very politically charged debate). When you add same-sex marriage, multiple generations, and single parenting into the mix, the definition of family is rapidly changing.

The issue of family change has repercussions on health care benefits, social security, generational legacies, and in a dozen other areas, many of which we're just discovering. It also impacts the kinds of family-friendly policies foundations, associations, and nonprofits set up to recruit and retain the staff they need.

5. MeBranding

Peter has coined two great terms in this book, Gen@ (which you've already figured out) and MeBranding, which is a great description of our growing expectation that things will be done exactly the way we want them. This is a social trend with immense impact.

Ultracustomization is the idea that we can segment markets down to the ultimate limit—the individual consumer. It is largely affecting the business market right now—but it will impact the expectations of staff, volunteers, boards, grantees, grantmakers, donors, clients, museum attendees, play goers, concertgoers, students, parents, and on and on. Nonprofits that figure out cost effective ways to attend to this trend—which can be *very* expensive—are going to accomplish their missions with greater ease than those who do not. They will thrive as others fold.

MeBranding may have another impact. As people grow more accustomed to getting things the way they like them, they lose understanding of the ways other people like things. An unintended consequence of MeBranding is that even as we have greater access to more and wider kinds of information, we self-select so minutely that we lose touch with the person sitting next to us.

This is mostly (but not completely) a Gen@ issue, with a smattering of GenX included. Boomers are certainly not exempt from being self-centered, but tend to stand confused and overwhelmed in the face of a shelf full of mega choices, while Gen@ kids just dive in.

6. Work-life balance

Work-life balance is almost purely a generation issue. As one columnist in *Newsweek* recently put it, Boomers, facing "their final exam," are rethinking their work-life balance as they enter their late fifties and early sixties. Boomers have been the "Thank God It's Monday" generation—working, working,

working. They developed the clueless child care rationalization of "quality time," eliminated the idea of a two-week vacation, and proselytized that everyone could have both a high-end business career *and* a perfect family life.

GenX watched the consequences, Gen@ experienced them, and both are saying "No way." Now there's a trend to rebalance lives and priorities. Highly trained women are dropping out of the career track to stay home and raise children—and more men are making the choice to be stay-at-home dads when their wives have higher earning potential. More people want to work from home, or even from remote locations, a trend that is enabled by technology.

Questions for You to Consider
So there are the six key trends: financial stress, technological acceleration, diversity of population, redefining the family, MeBranding, and work-life balance. No doubt other important trends will affect you and your nonprofit. But these six are critically important to nonprofits and they all have deep generational foundations.

The goal of this issue was to raise some questions on how you can address generational trends, today, to keep your nonprofit organization relevant and able to meet the changing needs of your staff, volunteers, donors, and the community you serve. Consider:

- How will these nonprofit trends affect your management planning or foundation administration?
- What impact will they have on your next nonprofit business plan, nonprofit strategic plan, or nonprofit fundraising plan?
- What role should these trends play in your vision statement?
- What about leadership evaluation, board of director roles, grant writing, organizational assessment, stakeholder analysis?

If you find this issue of *Tools You Can Use* helpful, be sure to look for our next issue as we will cover some of Peter's recommendations for dealing with these trends.

Sincerely,

Vince Hyman
Publishing Director
Fieldstone Alliance

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Volunteering in America Research Highlights

July 2009

The Corporation for National and Community Service hosts the most comprehensive collection of information on volunteering in the U.S. at its Web site: www.VolunteeringInAmerica.gov. The site allows civic leaders, nonprofit organizations, and interested individuals to retrieve a wide range of information regarding trends and demographics in volunteering in their regions, states, and almost 200 cities. This document highlights some of the key findings from the data. For the purposes of this report, volunteers are persons age 16 and older who serve through or with an organization without pay at any point during a 12 month-period between September of one year and September of the following year.

Key Findings

- In 2008, 61.8 million Americans or 26.4 percent of the adult population contributed 8 billion hours of volunteer service worth $162 billion, using Independent Sector's 2008 estimate of the dollar value of a volunteer hour ($20.25).

- Despite the challenges of a tough economic situation, the volunteering rate held steady between 2007 and 2008, while the number of volunteers slightly increased by about one million.

- Over 441,000 more young adults (age 16-24) volunteered in 2008 than 2007, representing an increase from about 7.8 million to more than 8.2 million.

- Neighborhood engagement levels have risen sharply since 2007, with a 31 percent increase in the number of people who worked with their neighbors to fix a community problem and a 17 percent increase in the number of people who attended community meetings.

- As the economy slows and nonprofit organizations struggle to provide services on smaller budgets, volunteers become even more vital to the health of our nation's communities. Between September 2008 and March 2009, more than a third (37%) of nonprofit organizations report increasing the number of volunteers they use, and almost half (48%) foresee increasing their usage of volunteers in the coming year.[1] Almost no nonprofit organizations are showing a decrease in their volunteer usage.

- Volunteers were much more likely than non-volunteers to donate to a charitable cause in 2008, with 78.2 percent contributing $25 or more compared to 38.5 percent of non-volunteers.

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[1] These results are from the most recent Sounding from the Listening Post Project, a national survey of nonprofit organizations done in partnership with the Corporation for National and Community Service. For a full report from this Sounding, see http://www.ccss.jhu.edu/pdfs/LP_Communiques/LP_Communique_14.pdf.

More New Research Findings

Volunteer Rates

While charitable giving declined in current dollars between 2007 and 2008 for the first time in over 20 years[2], in contrast the volunteer rate in the United States increased from 26.2 percent to 26.4 percent. That change represents an addition of almost one million volunteers serving in the country. Previous research indicates that a concurrent decrease in volunteering rates could occur during a time of economic recession, especially when there are decreases in home ownership and increases in unemployment rates. The fact that volunteer rates held relatively steady during such a time is a positive sign for service moving forward. Nonprofit organizations striving to meet the needs of families across the country are also hard-pressed by the economic situation, and are finding some relief by using more volunteers to achieve their goals. Many report that they have not only increased their reliance on volunteers of late, but also project that they will continue to increase their reliance on volunteers over the coming year.

Young Adult Volunteering

About 8.24 million young people ages 16-24 volunteered in 2008, over 441,000 more than in 2007. This increase in young adult volunteers makes up almost half of the overall increase in the number of volunteers nationally. The volunteer rate for this group increased significantly from 20.8 percent in 2007 to 21.9 percent in 2008. The interest among young people in volunteering coincides with their reported increase in the belief that it is essential or very important to help other people in need. The Higher Education Research Institute studies the attitudes of first-year college students each year and reported that in 2008, 69.7 percent of students held this belief in 2008—the highest rate since 1970.[3]

Neighborhood Engagement

In 2008, 8.5 percent of Americans reported that they worked with their neighbors to fix a community problem. In 2007, only 6.5 percent had reported the same. This two-percentage-point difference represents an increase of over 4.6 million people, from a little more than 15 million in 2007 to almost 20 million in 2008. Men were more likely to serve their community in this capacity, with 8.8 percent working with their neighbors compared to 8.1 percent of women doing the same, despite the fact that women were more likely to volunteer through or for an organization than men.

Additionally, 2008 saw an increase in Americans attending community meetings from 8.3 percent in 2007 to 9.6 percent in 2008. Men and women were about equally likely to attend community meetings.

Similarly, voter turnout rates were higher in 2008 than in recent presidential election years. Since the presidential election in 2000, voting rates among adults ages 18 and over have increased by over 7.2 percentage points, from 49.9 percent in 2000, and 55.1 percent in 2004, to 57.1 percent in 2008.

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[2] GivingUSA Foundation press release, "U.S. charitable giving estimated to be $307.65 billion in 2008," June 10, 2009. Available at http://www.givingusa.org/press_releases/gusa/GivingReaches300billion.pdf.
[3] This information from "The American Freshman: National Norms for Fall 2008," written by J.H. Pryor, S. Hurtado, L. DeAngelo, J. Sharkness, L.C. Romero, W.S. Korn, S. Tran, and published by the Higher Education Research Institute, released in January of 2009.

What Stops People from Volunteering?

In 2008, the Corporation for National and Community Service investigated the attitudes of volunteers, non-volunteers, and former volunteers to get a better sense of why people do or do not volunteer. Through targeted discussions in focus groups across the country, non-volunteers revealed the perceptions that have kept them from serving, and the things that might persuade them to serve:

- Non-volunteers see themselves as essentially different from volunteers. Non-volunteers tended to think of a volunteer as someone who was retired, without children in the home, and had an excess of leisure time. While these characteristics may be true for some volunteers, research shows that volunteers span a range of demographics including age, race, marital status, employment, and parenthood.

- Many non-volunteers fear the time commitment of service, expressing concerns that signing up for a volunteer activity would require that they continue indefinitely, even possibly for a lifetime.

- Non-volunteers say that they are more likely to serve if a trusted friend asks them to serve. Some people are also more likely to serve if they are able to use a skill they already possess, and others are interested in learning something new. Interviewing potential volunteers to determine their interests in this regard can help ensure they get the experience they are looking for.

Regional Volunteering Trends
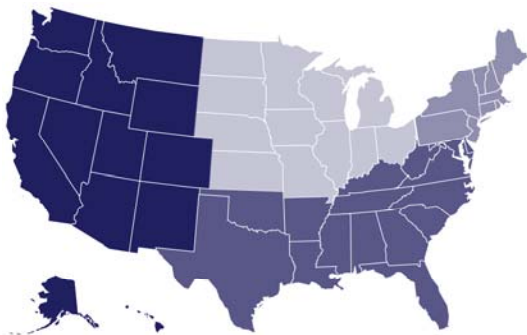
2008 Volunteer Rates by U.S. Region

Midwest	30.2%
West	28.2%
South	24.2%
Northeast	23.7%

- **Highest volunteer rate:** Since 1989, the *Midwest* region of the United States has had the highest volunteer rate among U.S. regions for all adults, with a rate of 23.9 percent in 1989, and 30.2 in 2008. This is a shift from 1974 when the West had the highest volunteer rate.

- **Largest number of volunteers:** Since 1974, the number of volunteers in the *South* has almost doubled from 10.5 to 20.7 million, giving the South the largest number of volunteers of all the regions. Just between 2006 and 2008, the South has gained almost 300,000 volunteers. The Midwest comes in at a distant second in volunteer numbers at about 15.6 million.

- **Largest number of volunteer hours served per resident:** The *West* region saw the largest number of hours served per adult at 38.8 hours per capita in 2008. Over the period of 2006-2008, the West also had the largest rate of intensive volunteers—those who serve 100 or more hours in a year—with 37 percent serving in this capacity.

- **Highest proportion of volunteers fundraising:** Volunteers in the *Northeast* region are the most likely to serve by fundraising or selling items to raise money than in any other region. Almost 3 out of ten (29.7%) volunteers in the region participate in fundraising as one of their top four activities when they serve.

State Volunteering Trends
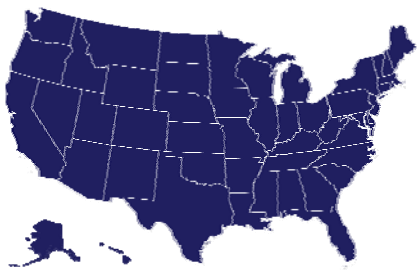
Top Ten States for Volunteer Rate[4]

1	Utah	43.5%		6	Montana	36.6%
2	Nebraska	38.9%		7	South Dakota	36.4%
3	Minnesota	38.4%		8	Kansas	36.2%
4	Alaska	38.0%		9	Vermont	35.6%
5	Iowa	37.1%		10	North Dakota	35.0%

- **Highest volunteer rate:** *Utah* had the highest overall volunteer rate between 2006 and 2008, at 43.5 percent. In fact, in every individual year since 2002, the state has had the highest volunteer rate in the US. Before 2002, state volunteering rates were last measured in 1989, at which point Utah ranked 2nd with a rate of 37.7 percent after North Dakota with a rate of 39.4 percent.

- **Largest number of volunteers:** *California* had the largest number of volunteers serving in their state, with about 7.1 million in 2008—almost 12 percent of all the volunteers in America. The state has consistently held the largest number of volunteers for every year complete data is available, starting with about 3.9 million people volunteering in 1989. California has been consistently followed by Texas in volunteer numbers. In 1989, about 2.6 million adults volunteered in Texas, and by 2008 that number grew to about 4.1 million.

- **Largest number of volunteer hours served per resident:** In addition to having the highest volunteer rate, *Utah* residents also served the largest number of volunteer hours per resident at 80.1 hours between 2006 and 2008. Additionally, over half (52.7%) of the state's volunteers served intensively between 2006 and 2008, contributing 100 hours or more in a year, the largest proportion of any state in the U.S. Idaho was second in intensive volunteering over the same time period, with 43.8 percent of their volunteers serving 100 hours or more.

- **Volunteer rate changes:** While most states saw their volunteer rate stay about even from 2007 to 2008, some states experienced growth. *Nevada* experienced the largest increase in their year-to-year volunteer rate at 3.6 percentage points, from 17.9% in 2007 to 21.4% in 2008. The rest of the top five states to experience growth in their volunteer rates include Utah, Arizona, New Jersey, and Nebraska, all with an increase of three percentage points or higher.

- **Highest level of neighborhood engagement:** *Alaska* had not only the highest percentage of residents attending community meetings in 2008 at 20.8 percent, but also had the second highest percentage of residents working with their neighbors to solve community problems at 17.9 percent, after Utah with 18.4 percent.

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[4] State volunteer rates in the table are computed using three years' worth of volunteer data (2006, 2007 and 2008), to increase statistical reliability.

Large City Volunteer Trends[5]

Top Ten Large Cities for Volunteer Rate

1	Minneapolis-St Paul, MN	38.4%		6	Columbus, OH	32.8%
2	Portland, OR	36.7%		7	Oklahoma City, OK	32.5%
3	Salt Lake City, UT	36.5%		8	Hartford, CT	32.0%
4	Seattle, WA	34.3%		9	Denver, CO	30.9%
5	Kansas City, MO	33.4%		9	Washington, DC	30.9%

- **Highest volunteer rate:** *Minneapolis-St. Paul* had the highest overall volunteer rate of the 51 largest metropolitan areas in the country[6] between 2006 and 2008 at 38.4 percent. Minneapolis-St. Paul was also ranked 1st for their volunteer rate between 2005 and 2007. The median volunteer rate for large cities during 2006 to 2008 was 27.3 percent.

- **Largest volunteer rate increases:** The top large cities with the greatest increases in their volunteering rates between 2004 and 2008 are *Virginia Beach, VA*; Las Vegas, NV; San Jose, CA; and Hartford, CT. These increases ranged from 5 percentage points in Hartford to 12.6 percentage points in Virginia Beach.

- **Largest number of volunteers:** *New York City* had the largest average number of volunteers per year between 2006 and 2008 at almost 2.4 million. Atlanta saw the largest increase in their volunteer numbers in recent years, with over 249,000 more volunteers in 2008 than in 2004.

- **Largest number of volunteer hours served per resident:** Residents of *Salt Lake City* served an average of 55.8 hours per year per person between 2006 and 2008, the highest number of hours in the country. Virginia Beach, VA had the highest rate of intensive volunteering among the large cities with 45.4 percent of residents serving 100 or more hours in a year between 2006 and 2008.

- **Highest level of neighborhood engagement:** *Seattle* residents were the most likely to attend public meetings between 2006 and 2008 at 14.2 percent. During the same time period, they also had the third highest rate of working with their neighbors to fix community problems at 11.6 percent after Baltimore at 14.5 percent and Salt Lake City at 12.9 percent.

- **Community factors impacting volunteer rates:** While there is no factor that can singularly explain changes in a given area's volunteer rate, there are a number of community characteristics that can work together to have an impact. Cities with higher homeownership rates, higher education levels, shorter commuting times, higher numbers of community organizations and associations and lower levels of poverty and unemployment tend to have higher volunteer rates. Additionally, communities in which volunteers tend to keep serving from one year to the next often have higher volunteer rates.

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[5] All data for cities are collected from Metropolitan Statistical Areas, as designated by the Federal Office of Management and Budget.
[6] Unless otherwise stated, statistics for large cities are computed using three years' worth of volunteer data (2006, 2007 and 2008) collected from fifty-one of the largest metropolitan areas in the U.S.

Mid-sized City Volunteer Trends[7]

Top Ten Mid-sized Cities for Volunteer Rate

1	Provo-Orem, UT	62.9%		6	Waterloo-Cedar Falls, IA	39.3%
2	Iowa City, IA	49.2%		7	Fort Collins-Loveland, CO	38.3%
3	Ogden-Clearfield, UT	43.6%		7	Greenville, SC	38.3%
4	Madison, WI	41.5%		9	Des Moines, IA	38.2%
5	Topeka, KS	40.7%		10	Grand Rapids-Wyoming, MI	37.8%

- **Highest volunteer rate:** Mid-sized city volunteer rates tend to be a little bit higher than the volunteer rates for large cities. The highest volunteer rate of the mid-sized cities is 62.9 percent, found in **Provo, UT**, and the lowest at 16.8 percent is in El Paso, TX. The median volunteer rate for mid-size cities is 28.6 percent.
- **Largest number of volunteers:** **Grand Rapids, MI** had the most volunteers between 2006 and 2008 of the 75 mid-sized metropolitan areas with almost 272,000. Bridgeport, CT had the second largest number of volunteers with just over 235,000.

Updated Volunteering in America Web Site

The Corporation has updated its *Volunteering in America* Web site located at **VolunteeringInAmerica.gov** to more easily share information on volunteer activities and demographics across the nation. The site showcases research and rankings of the 50 states and the District of Columbia and almost 200 metropolitan areas in the U.S. The Web site gives individuals and organizations the ability to access and generate unique reports with the most relative data available for their region, state, or city. Additional volunteer research and new resources including effective practices, tip sheets, webinars and more for organizations and prospective volunteers will also be hosted on the site.

Methodological Note

The data used in this report were collected through supplements to the September Current Population Survey (CPS) in 1974, 1989, and 2002-2008. Today the CPS is a monthly survey of about 60,000 households (approximately 100,000 adults), conducted by the U.S. Census Bureau for the Bureau of Labor Statistics. The purpose of the September supplement is to obtain information on the incidence of volunteering, the characteristics of volunteers, and civic life indicators in the United States. The city volunteer statistics reported here are calculated using CPS data collected from Metropolitan Statistical Areas (MSAs). The Office of Management and Budget (OMB) publishes a comprehensive definition of MSA boundaries every 10 years to reflect population changes documented by the decennial Census.

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[7] Unless otherwise stated, statistics for mid-sized cities are computed using four years' worth of volunteer data (2005, 2006, 2007 and 2008) collected from 74 medium-sized metropolitan areas in the USA.

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Nonprofit Organizations Per 1,000 Residents

	Washington	US
Small Nonprofits	2.57	2.32
Large Nonprofits	2.15	1.96

Legend
Washington — US
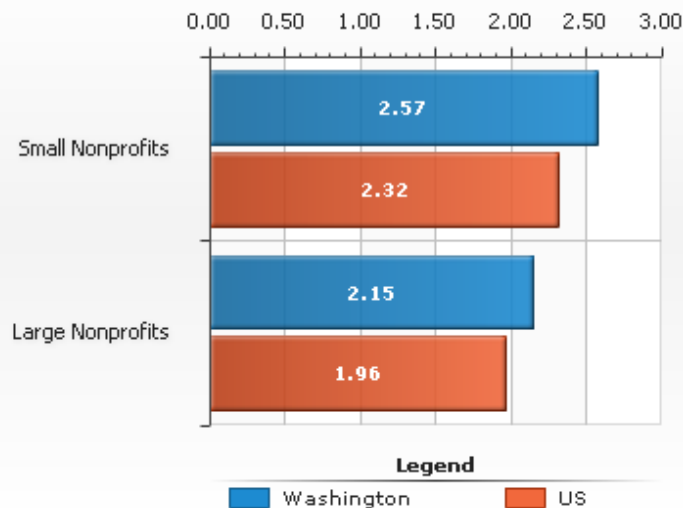
Historical Volunteer Rate

Year	Washington	US
1989	31.6%	20.4%
2004	36.9%	28.8%
2008	33.7%	26.4%

Legend
Washington — US

Total Volunteer Hours

Year	Millions
2002	231.5
2003	276.5
2004	282.1
2005	249.8
2006	265.8
2007	206.6
2008	245.7
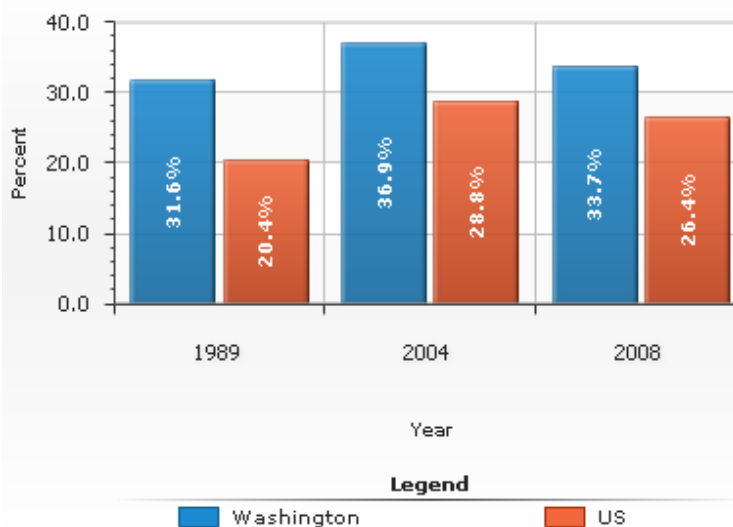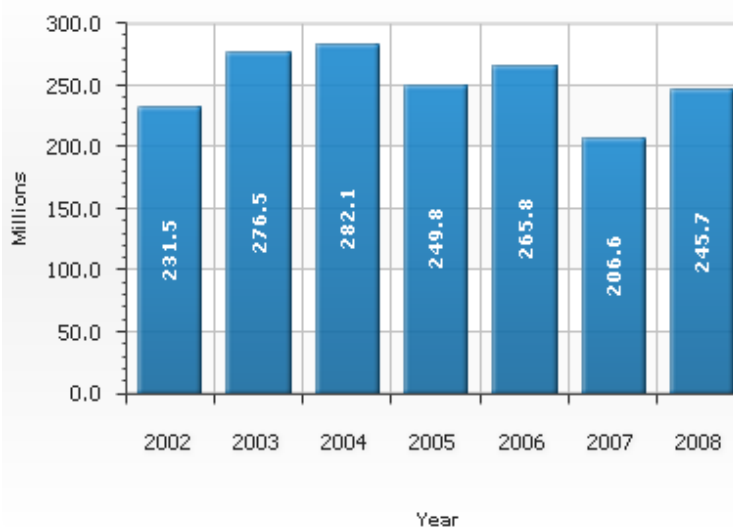
Trends and Highlights

Based on single year data (2008)

◻ Even with the economic crisis, the national volunteer rate remained relatively constant, from 26.2% in 2007 to 26.4% in 2008. In 2008, 61.8 million volunteers donated approximately 8 billion hours of service in communities across the country.

◻ 33.7% of adults volunteered in Washington in 2008, contributing 245.7 million hours of service.

◻ In addition to the 1.7 million adults in Washington volunteering in 2008, an extra 247,803 individuals worked with their neighbors to fix a problem or improve a condition in their community but did not serve through an organization.

For more information, go to **http://www.VolunteeringInAmerica.gov**

Rankings Highlights

Average rates and rankings are based on 2006 to 2008 data.

◻ Volunteering: Rate - 33.9% and Rank - 11

◻ Volunteer Hours per Resident: 47.4 hours and Rank - 5

◻ Volunteer Retention: Rate - 75.2% and Rank - 3

◻ Older Adults: Rate - 28.4% and Rank - 15

◻ Baby Boomer: Rate - 37.7% and Rank - 12

◻ College Students: Rate - 36.9% and Rank - 5

◻ Young Adults (16-24 yo): Rate - 30.8% and Rank - 2

◻ Teenagers (16-19 yo): Rate - 41.2% and Rank - 3

◻ Millennials (Born in/after 1982): Rate - 30.1% and Rank - 2

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* Not reported due to the sample size for this estimate.

SERVE.GOV VolunteeringInAmerica

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Neighborhood Engagement - Rates

Percent

Work with Neighbors	9.6% (2006)
	12.1% (2007)
	13.0% (2008)
Attend Public Meeting	13.2% (2006)
	12.2% (2007)
	14.7% (2008)

Legend
■ 2006   ■ 2007   ■ 2008
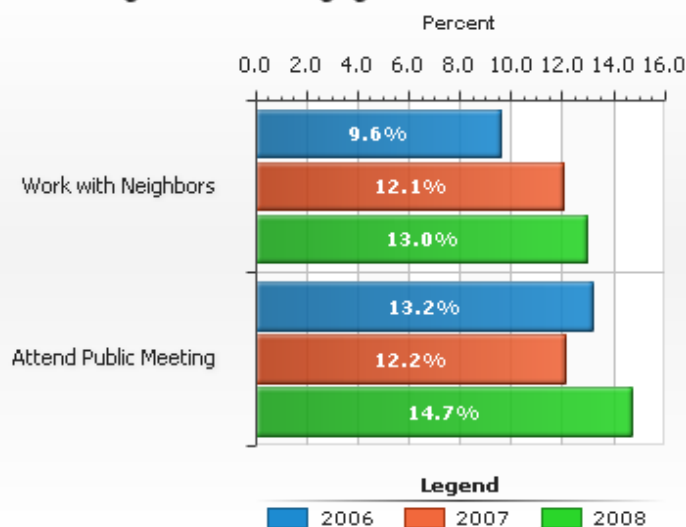
Neighborhood Engagement - Numbers

Thousands

Work with Neighbors	476.4 (2006)
	610.2 (2007)
	665.6 (2008)
Attend Public Meeting	656.1 (2006)
	614.7 (2007)
	754.5 (2008)

Legend
■ 2006   ■ 2007   ■ 2008

Volunteer Hours Per Resident

Avg. Hours served in a year

Year	Washington	US
2002	50.3	36.8
2003	59.1	37.6
2004	58.9	37.9
2005	51.3	36.3
2006	53.5	35.3
2007	40.9	34.8
2008	48.0	34.2

Legend
■ Washington   ■ US
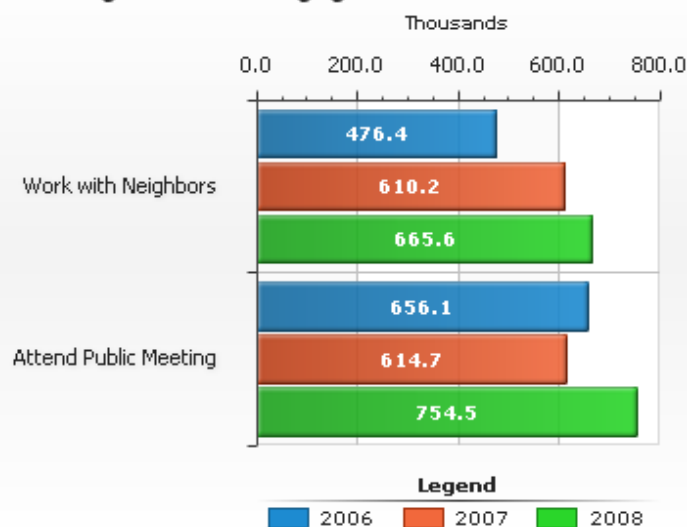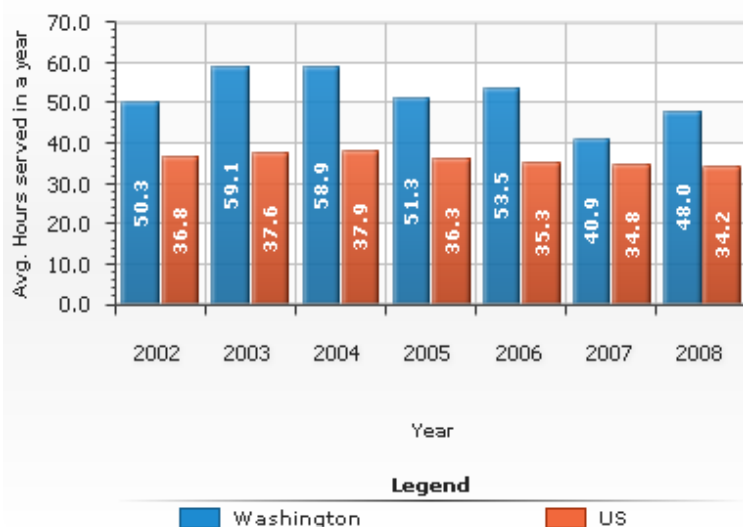
Volunteer Rate by Geographic Area

Percent

Urban	Suburban	Rural
31.0%	35.7%	35.7%

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Washington

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Washington Volunteering by Age Group

Age	Median Hours	State Rate	National Rate
16-19	36	41.2 %	25.6 %
20-24	*	23.0 %	18.1 %
25-34	35	28.5 %	22.9 %
35-44	60	41.0 %	31.0 %
45-54	64	36.9 %	30.4 %
55-64	67	35.7 %	28.1 %
65-74	100+	29.1 %	26.7 %
75+	*	27.6 %	20.3 %

Washington Volunteering by Race & Ethnicity

Race	Median Hours	State Rate	Nation Rate
White	60	35.3 %	28.0 %
Black	*	32.5 %	18.8 %
Native American /Alaskan	*	*	*
Asian	*	21.9 %	18.3 %
Hawaiian /Pacific Islander	*	*	*
More than one	*	27.3 %	26.2 %
Ethnicity			
Latino	*	23.2 %	13.9 %
Non-latino	60	34.7 %	28.4 %

Washington Volunteering by Special Population and Gender

Population	Median Hours	State Rate	National Rate
Baby Boomers	60	37.7 %	29.9 %
College Students	*	36.9 %	26.3 %
Older Adult	40	28.4 %	23.7 %
Teenagers	*	41.2 %	25.6 %
Young Adults (ages 16-24)	*	30.1 %	21.2 %
Gender			
Male	52	28.4 %	23.0 %
Female	60	39.2 %	29.6 %

Voting Information

Percent

Year	Washington	US
2000	56.8%	49.9%
2004	60.4%	55.1%
2008	61.0%	57.1%

Legend: Washington / US

Volunteer Retention

2008	Washington	US
	75.2%	64.5%

Year

Legend: Washington / US

Volunteers and the Economic Downturn

Introduction

The recent economic crisis has subjected America's nonprofit organizations to considerable fiscal stress. To find out more about the response of nonprofits to the recent economic climate, the Corporation for National and Community Service partnered with the Johns Hopkins Nonprofit Listening Post Project[i] on a national survey of nonprofits and AmeriCorps sponsor organizations.

The survey revealed that 80 percent of responding organizations experienced some level of fiscal stress between September 2008 through March 2009, when the downturn intensified, and that for close to 40 percent of them the stress was considered "severe" or "very severe." In response, nearly a quarter (23%) of nonprofits reported decreasing staff hours, a third reported eliminating staff positions, and 40 percent reported postponing the filling of new positions. At the same time, nearly three-fourths of the organizations reported they had maintained or increased the number of people their organizations served, and even among those reporting "severe" or "very severe" fiscal stress and resulting cutbacks in staff, 60 percent reported they had been able to maintain or increase the number of people their organizations served.

Volunteers to the Rescue

How is this possible? How did organizations experiencing fiscal stress and cutbacks or downsizing on personnel manage to maintain or increase their client and patron service?

At least part of the explanation lies in the increased use organizations were able to make of volunteers. In particular:

- One out of every three organizations reported increasing their reliance on volunteers to cope with the economic downturn between September 2008 and March 2009.

- Whether because of the recession, or despite it, most (80% to 90%) responding organizations reported maintaining or increasing their use of volunteers, whether this was measured by the sheer number of volunteers (88% of organizations reported maintaining or increasing the scale), the number of volunteer hours (84% of organizations reported maintaining or increasing this number), the ability to recruit volunteers (83% of organizations reported increasing or maintaining this capacity), or the contributions that volunteers made (83% of organizations reported increases) (See Figure 1).

Figure 1: Economic Downturn and Nonprofit Use of Volunteers
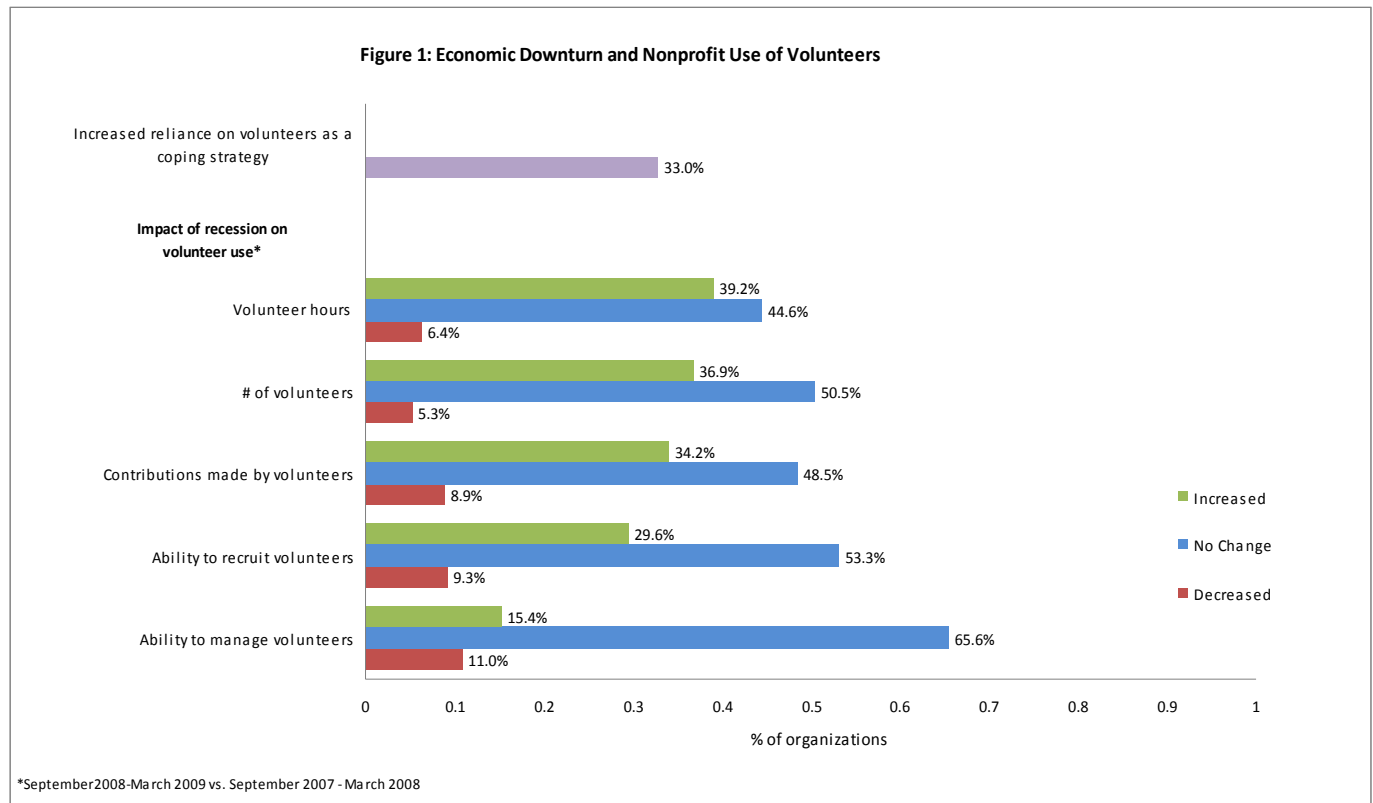
- This reliance on volunteers is expected to increase further over the coming year. About half (48%) of the organizations expect their reliance on volunteers to increase over the next year, and only five percent expect it to decrease. This is so, moreover, despite the fact, or perhaps because of the fact, that 33 percent of respondents say they expect to cut staff in the coming year.

- This increased reliance on volunteers seems to have yielded important dividends for organizations. Thus:

  o The 33 percent of all organizations that reported relying more heavily on volunteers as a coping strategy during the September 2008-March 2009 period were more likely than their counterparts in the overall sample to report "very severe" fiscal stress (40% vs. 26%);

- o Yet these organizations were still nearly as likely as the overall sample of organizations to report that they were "somewhat" or "very" successful in coping with the economic crisis (58% vs. 66%);

- o Similarly, these organizations were nearly as likely to report generally positive views of their futures (69% vs. 75%).

Volunteers Still Need Support

While increased reliance on volunteers has proved to be a useful strategy for coping with the economic crisis, it is hardly a panacea, particularly in the face of decreasing paid staff. As one respondent put it: "If there is not someone managing these volunteers, it will be difficult to engage and rely on volunteer support."

Data from the Hopkins Listening Post survey already reveal an emerging challenge in this area. Thus:

- As Figure 1 above shows, while 37 and 39 percent of organizations reported increases in the number of volunteers, and the number of volunteer hours, respectively, only 15 percent reported an increase in their ability to manage volunteers. On the other hand, over 10 percent reported a decline in this ability.

- Organizations that reported staffing issues, namely an inability to attract and retain staff, were also more likely than the sample as a whole to report declines in their ability to manage volunteers (27% vs. 11%, respectively);

- Organizations that both increased reliance on volunteers and increased their ability to attract and retain staff were more likely to report being "somewhat" or "very" successful financially as of March 2009 compared to those that increased reliance on volunteers but that suffered declines in their ability to attract and retain staff (67% vs. 33%).

Implications for the future

It is clear that organizations are reaching out to volunteers for support. Organizations that were hardest hit by the economic crisis seem to have been most likely to increase their reliance on volunteers. Thanks at least in part to the availability of volunteers, many of these organizations were able to maintain or increase their client or patron services.

While volunteers are playing and will continue to play an instrumental role in helping the nonprofit sector survive the economic crisis without reducing its services, over the long run it will be important to avoid thinking of volunteers as a substitute for paid staff. To the contrary, in normal times it is precisely the presence of paid staff that makes volunteer assignments most effective.

The Listening Post Project
The Listening Post Project is a collaborative undertaking of the Center for Civil Society Studies at the Johns Hopkins University Institute for Policy Studies (http://www.ccss.jhu.edu/), the Alliance for Children and Families, the Alliance for Nonprofit Management, the American Association of Homes and Services for the Aging, the American Association of Museums, Community Action Partnership, League of American Orchestras, Lutheran Services in America, Michigan Nonprofit Association, the National Council of Nonprofits, and United Neighborhood Centers of America. Its goal is to monitor the health of the nation's nonprofit organizations and assess how nonprofits are responding to important economic and policy changes. Support for the Listening Post Project has been provided by the Carnegie Corporation of New York, the Bill and Melinda Gates Foundation, the Ewing Marion Kauffman Foundation, the Corporation for National and Community Service, the Kresge Foundation, the Charles Stewart Mott Foundation, the Rockefeller Brothers Fund, and the Surdna Foundation.

For additional information on the Listening Post sample, methodology, and the present survey please visit: www.jhu.edu/listeningpost.   For more results from this survey, see Listening post Communiqué no. 14 (http://www.ccss.jhu.edu/pdfs/LP_Communiques/LP_Communique_14.pdf).

For questions about the listening post please email us at listeningpostproject@jhu.edu

The Corporation for National and Community Service
In 2008 the Listening Post Project partnered with the Corporation for National and Community Service to incorporate a cross-section of Corporation grantees into the project's sampling frame. Through the Economic Downturn Sounding, the Listening Post Project was able to include 104 Corporation grantees in its analysis for the Economic Downturn Communiqué.

End Note

[i] In order to better understand the impact of the economic downturn on the nation's nonprofit sector, the Listening Post Project conducted a survey of its nationwide sample of over 1,400 nonprofit organizations in five key fields (children and family services, elderly housing and services, education, community and economic development, and the arts) in April of 2009. The focus of this survey was on the six month period between September 2008 and March 2009, when recessionary pressures intensified, though some questions were asked as well about calendar year 2008 as compared to 2007. Altogether, 363 organizations responded to this Sounding, producing a response rate of 26 percent.

What You Need to Know About Volunteering

Office of Planning, Research, and Evaluation

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What You Need to Know About Volunteering

Thought Leadership from the Office of Planning, Research and Evaluation

There are things we know about volunteering that have implications for nonprofits, Volunteer Centers, and POLF. What we consider the major ones are discussed below.

The Family Connection

Finding

There is a strong family dynamic in volunteering. When a family decides to spend its time on volunteering, that decision seems to apply to all family members. If one person in a family volunteers, the other family members are more likely to volunteer. This is especially true of spouses. If one spouse volunteers, so does the other. It is also true of parent(s) and children. Families with children volunteer more than do families without children, and youth who have volunteering parents are more likely to be volunteers.

Implications for Nonprofits

Current volunteers can be a major *and easy* source of new volunteers. The family members of their current volunteers represent an untapped resource.

Implications for Volunteer Centers

Volunteer Centers should be equipped to promote family volunteering. This includes helping their partner organizations plan, prepare, promote, and manage family volunteering projects. It also calls for special skills in helping nonprofits overcome the barriers associated with creating after school and weekend volunteering opportunities that are appropriate for young people.

Implications for POLF

1. We should have a marketing campaign around family volunteering.
2. We should have training for Volunteer Centers on family volunteering that prepares them, the Volunteer Centers, to help local nonprofit organizations plan, prepare, promote, and manage family volunteering projects.

The Aging Population

Finding

If nothing else changes – if older Americans volunteer at the same rate in the future as they do now – the number of older volunteers will grow dramatically as the population ages. Older people have different ideas about volunteering. They are more likely than others to want to use their accumulated skills and knowledge, want to pass on this knowledge, and more likely to want a predictable schedule.

Implications for Nonprofits

Nonprofits need to be prepared to have programs that are attractive to older people. They need programs that will take advantage of seniors' skills (as opposed to unskilled volunteering), and they need help in establishing programs that have strong knowledge transfer potential.

Implications for Volunteer Centers

Volunteer Centers need help in understanding the dynamics of senior volunteering, their motivations, and their concerns. They should be prepared to plan, prepare, promote, and manage senior volunteering projects.

Implications for POLF

1. POLF should have a strong public relations campaign around senior volunteering, about how it is a way for seniors to share their wisdom and knowledge with others.
2. POLF should have training programs that will Volunteer Centers understand the dynamics of senior volunteering and to help local nonprofit organizations plan, prepare, promote, and manage senior volunteering projects.

Minority Volunteering

Finding

Minorities (non-Hispanic blacks and Hispanics of any race) are less likely than whites (non-Hispanic whites) to volunteer. However, when asked to volunteer, they are just as likely to volunteer as whites. The problem is that minorities are not asked as often.

Implications for Nonprofits

Nonprofits need methods and materials for attracting minorities into volunteering.

Implications for Volunteer Centers

Volunteer Centers need to be able to give their nonprofit partners guidance on how to market to minorities.

Implications for POLF

1. POLF needs a marketing campaign around attracting minorities into civic service.
2. POLF should have training programs that will Volunteer Centers understand the dynamics of minority volunteering and to help local nonprofit organizations plan, prepare, promote, and manage minority volunteering.

Youth Volunteering

Findings

People who begin volunteering as youth are more likely to be volunteers as adults. However, the quality of the youth volunteering is important. Youth who have low-quality

volunteering experiences are no more likely to become adult volunteers than are youth who never volunteered.

Implications for Nonprofits

Nonprofits need to understand that when they work with youth, they are helping shape an attitude and openness to volunteering that will last a lifetime. They need to understand the aspects of what makes a quality volunteering experience for youth, and how to plan and implement programs that will maximize the experiences they give youth.

Implications for Volunteer Centers

Volunteer Centers should be able to help their nonprofit partners plan and implement programs for working with youth. They should be prepared to help them understand the skills and abilities of youth, and issues such as liability and child labor laws. And they should be able to convey the importance of shaping future attitudes.

Implications for POLF

1. POLF needs a marketing campaign focused on attracting youth into volunteering.
2. POLF needs to be able to train Volunteer Centers on the above issues.

Motivations

Findings

There are six basic motivations for volunteering. What is important is not that one is more prevalent that the others, it's that every volunteer has a primary motivation. When the opportunity matches the motivation, volunteers are more likely to become committed volunteers. The six motivations, from our friends Gil Clary and Mark Snyder, are:

1. The Values Function: which enables volunteers to act on deeply held beliefs about the importance of helping others – *I am concerned about those less fortunate than myself.*

2. The Understanding Function: which enables volunteers to satisfy a desire to understand beneficiaries, organisations or the volunteer him/herself - *Allows me to gain a new perspective on things.*

3. The Career Function: which enables volunteers to learn new skills – *Will look good on my resume.*

4. The Social Function: which enables volunteers to meet people, make friends.

   And two which "represent ways in which volunteering is undertaken for the specific purpose of making one feel better about oneself".

5. The Esteem Function is the positive aspect of this – *Makes me feel needed..*

3

6. The Protective Function is the negative aspect – *Helps me work through my own personal problems*.

Implications for Nonprofits

Not all volunteering opportunities are created equal for all people. They need to understand that some opportunities are inherently more attractive to some people who share a certain motivation.

Implications for Volunteer Centers

Volunteer Centers need to be able to teach their nonprofit partners about motivations, how to determine which motivation(s) match different opportunities, and how to structure volunteer recruitment to take advantage of motivations.

Implications for POLF

1. POLF needs a series of promotional materials that address each motivation. For example, the prior "Do something good, feel something great" message only addresses one motivation.
2. POLF needs to work with Gil and Mark to develop training around understanding and acting on volunteer motivations.

In summary, there are facts about volunteering that can and should influence POLF program and marketing priorities. These facts point to areas in which POLF can and should have impact. We are available to discuss them in detail with you should you agree that they have strategic potential for POLF.

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Baby Boomers and Volunteering:
An Analysis of the Current Population Survey
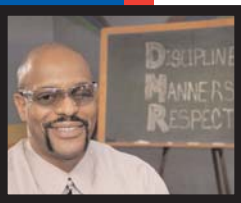
Each year since 2002, the Bureau of Labor Statistics has collected data on the volunteering habits of Americans as part of the Current Population Survey (CPS), a monthly sampling of 60,000 U.S. households. To increase understanding of how to capture the experience and energy of the 77 million Americans born between 1946 and 1964, a generation commonly known as the baby boomers, the Corporation for National and Community Service looked at the most recent data, which was released in December 2005. It also commissioned RTI International to conduct a detailed analysis of data on the volunteering habits of boomers and other age cohorts that had been collected in the 2002–2004 CPS surveys. The analysis resulted in several findings that should inform the way we go about fostering volunteering and other forms of civic engagement among boomers — a highly educated, skilled, and talented generation whose involvement in volunteer activities will be critical to solving the social problems facing our nation. (The figures in the first three bullets below are based on the 2005 CPS data; all other figures are based on the analysis of the 2002–2004 surveys.)

▶ **One-Third of Boomers Volunteer.** Boomers traditionally have a poor reputation for their rate of volunteering and for their involvement in other forms of civic life. Yet nearly a third (33.2%) of all boomers — comprising some 25.8 million people — volunteered for formal organizations in 2005.

▶ **Boomers Have the Highest Volunteer Rate of Any Age Group.** The volunteer rate for boomers — 33.2% — is the highest of any age group, and more than four percentage points above the national average of 29%.

▶ **Boomers Volunteer an Average of 51 Hours a Year.** With the exception of people over age 65, boomers volunteer the most of any age group, with the average boomer volunteer serving 51 median hours a year, or approximately one hour a week. If boomers follow the same volunteering patterns as their older siblings and parents, we can expect boomers' commitment to volunteer work to rise as they age and retire.

▶ **Boomer Volunteering Is Highest Among Those Who Work Part Time.** Almost half (46.3%) of all boomers who work part time also volunteer, compared to one third (33.7%) of boomers who work full time and one quarter (24.3%) of boomers who are either unemployed or not in the labor force. In several studies, a high percentage of boomers have indicated that they plan to work well into their

(Continued)

later years, if only part time. Consequently, targeting boomers through their place of work may be a key to inducing boomers, and especially those with professional skills, to devote some of their time and talents to volunteering at nonprofit organizations.

▶ **Boomers Engage in Diverse Volunteer Activities.** Overall, boomers are following in the historical tradition of older generations by assuming leadership volunteer roles as they grow older, with about 23% reporting that they provide professional and managerial services to volunteer agencies. But boomer volunteers select many diverse types of volunteer opportunities that rely on a wide variety of skills and interests. Among the direct service activities favored by boomers are collecting and preparing food, tutoring and teaching, and mentoring. Among indirect services, boomers generally favor fundraising, professional and management services, and general labor.

▶ **Boomers Are More Apt Than Other Cohorts to Volunteer With More Than One Organization.** Although most Americans, including boomers, volunteer for only one organization, boomers are the most likely of all age groups to volunteer for more than one organization. That may indicate that boomers can be attracted to volunteering in several capacities.

▶ **Strong Community Ties Increase Volunteering.** Consistent with the importance that strong community ties play in areas such as community development and school reform, boomers who own businesses and are homeowners have higher volunteer rates — 45% and 34%, respectively — than do non-business owners and non-homeowners, who have average volunteering rates of 30% and 20%, respectively. That is true even after controlling for other factors, including education levels, race, and ethnicity.

▶ **Boomer Women Volunteer at a Higher Rate Than Boomer Men.** Approximately 36.9% percent of boomer women volunteer, compared to 29.4% of boomer men.

▶ **Boomer Males Volunteer at a Higher Rate Than All Other Male Age Groups.** At 29.4%, boomer males have the highest rate of volunteering of any age cohort of males. As a result, the gender gap in volunteering among boomers is lower than among all generations born after 1964.

▶ **College-Educated Boomers Have a Higher Volunteer Rate Than Boomers Without a College Education.** Almost half of all college-educated boomers (49.8%) volunteer, compared to 25.7% of all non-college educated boomers.

▶ **Non-College Educated Minorities Volunteer at Higher Rates Than Non-College Educated Whites.** Most people think of baby boomers as being well educated. Although it is true that boomers have higher rates of educational attainment than older generational groups, nearly 70% of boomers have not graduated from college. It is interesting, therefore, to note that among boomers with only a high school education, blacks (at 23.6%) and Hispanics (at 21.9%) volunteer at higher rates than do whites (20.9%).

CORPORATION FOR NATIONAL AND COMMUNITY SERVICE

The Corporation for National and Community Service provides opportunities for Americans of all ages and backgrounds to serve their communities and country through three programs: Senior Corps, AmeriCorps, and Learn and Serve America. Together with USA Freedom Corps, the Corporation is working to foster a culture of citizenship, service, and responsibility in America. For more information, visit www.nationalservice.gov.

December 2005

Corporation for
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**USA
Freedom Corps**
Make a Difference. Volunteer.

Job Descriptions

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United Way
United Way of King County

CREATING A GREAT
JOB DESCRIPTION

SIX STEPS TO CREATING A GREAT JOB DESCRIPTION

Remember to allow a group of individuals who might be affected by the volunteer position (paid staff, clients, supervisors, other volunteers) to help created the job descriptions. This will help to achieve buy-in & a complete job description.

GOAL: Start by identifying the desired outcome for clients or the organization

NEED: Describe what the organization needs to achieve the desired outcome. Avoid thinking in terms of the normal operating procedure.

ROLE: Define the role or roles volunteers might play in achieving your vision.

SKILLS:
              Make a list of the skills required to fulfill the defined role(s).

TIME:
              Think about when the job must be done. Avoid limiting your thinking to your own current schedule.

MISC:
              What else is important to achieving your GOAL?

The 6 Steps to Writing Volunteer Job Descriptions Sample

In the **TIME** allowed, what **SKILLS** will the volunteer have to have to perform the **ROLE** which fulfills this particular **NEED** that can help us to achieve our **GOAL**?

GOAL: *To decrease the number of youth living on the streets by 50%.*

NEED: *Locate or construct more transitional housing projects for youth in King County.*

ROLE: *"Researcher" to gather information on current transitional housing options for homeless youth, to eventually be placed in brochure form.*

SKILLS: *Strong organizational and interpersonal skills. Position requires making phone calls to contacts throughout the county, as well as some face-to-face encounters. Database design and entry skills strongly desired.*

TIME: *This particular assignment can be accomplished at home or at our office, on a part-time basis. We are hoping to have the information accumulated by [DATE] for the purposes of our planned collaboration with ….*

MISC: *This is where you could list other NEEDS which will allow you to achieve your OBJECTIVE, but may not be doable for a volunteer.*

Job Design Process

THE FIVE STEPS:

- Step 1   Review the mission of the organization
- Step 2:   Identify the functions that support your mission
- Step 3:   Identify the skills necessary for the task.
- Step 4:   Identify and describe volunteer assignments (job description)
- Step 5:   Match volunteers to assignments

STEP 1: REVIEW THE MISSION OF THE ORGANIZATION

Know thyself. Make sure that the work and tasks you assign to staff or volunteers does support the mission of the organization. Are there functions and tasks which are critical to the mission of the organization that are not being done?

STEP 2: IDENTIFY THE FUNCTIONS, COMPONENTS AND TASKS THAT SUPPORT YOUR MISSION

Break down the work of your organization into a set of functions, components and tasks. This analysis begins with more broadly defined functions of the organization and becomes progressively more detailed. Components are the subset of a particular function and tasks are a further subset of components.

STEP 3: IDENTIFY THE SKILLS NECESSARY FOR THE TASK

Assess the skills required for a particular task or assignment considering the following:

Skills Analysis: What skills are required to perform the task (technical, professional qualifications, interpersonal skills, personal characteristics)

Skill Variety: Which skills are essential for the task (are some skills desirable, or "nice to have", are any combinations of skills required, can skills be acquired on the job?)

Autonomy: How much control will the volunteer have over performance of tasks? How much supervision might the task require?

Excerpt from **A Matter of Design:** *Job Design Theory and Application to the Volunteer Sector,* Volunteer Canada, 2001

STEP 4: IDENTIFY AND DESCRIBE VOLUNTEER ASSIGNMENTS

The goal in producing the assignment description should answer the following questions:

- What tasks does the assignment involve (provide thorough outline)?
- What skills are essential? Which are desirable?
- What are other attributes necessary for the assignment (level of autonomy, interpersonal skills, professional qualifications)
- What level of screening will be required of volunteers
- How long will the assignment last? What are the time parameters.
- Is there flexibility in the volunteer assignment based on availability?
- How open is the assignment to variations in volunteer skills, preferences and methods of working
- How does the assignment fit with the overall mission and strategic plan of the organization

STEP 5: MATCH VOLUNTEERS TO ASSIGNMENTS:

Volunteer and Agency review the position description associated with the volunteer assignment. The position description should detail:

- The purpose of the assignment
- Tasks to be undertaken
- Specific parameters for the assignment
- The skills required
- Working conditions

Excerpt from **A Matter of Design:** *Job Design Theory and Application to the Volunteer Sector,* Volunteer Canada, 2001

FUNCTION, COMPONENTS AND TASKS
THREE EXAMPLES

United Way

United Way of King County

Functions and Components: three examples			
Organization	Health care organization (Large organization, huge staff, many volunteers)	**Community food bank** (Medium-sized organization, some staff, some volunteers)	**Soccer League** (Small organization, no paid staff, all volunteers)
Mission	To eradicate a specific illness and to promote quality of health	To provide good food to people in need	To teach kids to play soccer, to promote healthy activity and good sportsmanship
Functions	• Research • Program Development • Public Relations • **Fundraising**	• Acquiring food • Soliciting donations of money • Managing volunteers • Staffing the office • Facilities Maintenance • **Distributing the food**	• Recognition and awards • Registration • Fundraising • Supervision • Officiating • Training and Skill development • **Game Scheduling**
Components	**Components of Fundraising:** • Direct Mail • Donor recognition • **Corporate Awards Night** • Donor support • Corporate development	**Components of Distributing Food** • Fill the food requests • **Make sure shelves are stocked** • Communicate needs to office • Train volunteers	**Components of Game Scheduling:** • **Plan the schedule** • Book the fields • Organize finals • Communicate schedule
Tasks	**Tasks for organizing Corporate Awards Night:** • Oversee awards committee • Organize entertainment • Make arrangements for the dinner • Sell tickets • Promote the event • Solicit prizes	**Tasks for making sure the shelves are adequately stocked:** • Keep inventory • Receive foods and stock shelves • Review client needs and pass the information on to solicitation team • Organize foods for distribution • Suprervise volunteers	**Tasks for planning the schedule:** • Review teams • Determine dates • Co-ordinate finals

Excerpt from **A Matter of Design:** *Job Design Theory and Application to the Volunteer Sector,* Volunteer Canada, 2001

Function Analysis Template:

Organizational Mission

Organizational Functions
 	
    1.
 	
    2.
 	
    3.
 	
    4.

Components
Function #1
       a.
       b.
       c.
       d.
       e.
 	
Function #2
       a.
       b.
       c.
       d.
       e.
 	
Function #3
       a.
       b.
       c.
       d.
       e.
 	
Function #4
       a.
       b.
       c.
       d.
       e.

Excerpt from **A Matter of Design:** *Job Design Theory and Application to the Volunteer Sector,* Volunteer Canada, 2001

Component Breakdown Template

Component

Tasks:

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

Excerpt from **A Matter of Design:** *Job Design Theory and Application to the Volunteer Sector,* Volunteer Canada, 2001

Job Description Template (page 1 of 2)

Assignment
Purpose
Tasks
Time Commitment
Firm vs. flexible time **Skill Requirements**

Excerpt from **A Matter of Design:** *Job Design Theory and Application to the Volunteer Sector,* Volunteer Canada, 2001

Training and Skill Development
Supervision
Authority/ Decision Making
Supporting Policies
Working Conditions
Benefits
Agreement/ Approval

Date	**Volunteer Signature**
Date	**Supervisor's Signature**

Excerpt from **A Matter of Design:** *Job Design Theory and Application to the Volunteer Sector,* Volunteer Canada, 2001

United Way of King County

Basic Criteria for Developing Volunteer Positions

- Is this a real job? Can its usefulness be made clear and concrete to the volunteer?
- Can this job be done satisfactorily on a part-time basis?
- Will time required for training and for support be in proportion to the volunteer time needed in actual service?
- Are staff willing to have the jobs done by volunteers?
- Can essential supportive staff work be provided?
- Can staff work adjustments be made or "back stops" be built in if the volunteer's other priorities make this necessary?
- Does the job consider the varied interests and skills volunteers may bring and the value of their community relationships?
- Are there possibilities for volunteer satisfaction in doing this job?
- Is it probable that the kind and/or number of volunteers required for this job can be recruited?
- Can you imagine a person really wanting to do this job?

From: The Volunteer Administrators' Network of Central Ohio. Copyright 1987.

Elements in a Volunteer Job Description

- Job title
- Brief job description
- Anticipated results
- Agency name
- Agency address and phone
- Supervisor
- Time parameters of volunteer job
- Qualifications for job
- Responsibilities
- Benefits
- Training requirements
- Contact person for application for job
- Volunteer work site
- Evaluation requirements for position
- Date job description was discussed with volunteer
- Date job description was revised

Note: this is an ideal for a job description. Not all descriptions need to contain all of this information.

From: 1986 McCurley & Vineyard, 101 ideas

VOLUNTEER POSITION DESCRIPTION
SAMPLE

Title: After School Tutor

Objective:
To motivate and guide students, challenging them to upgrade their academic performance, and to help them succeed at their school work, and ultimately, function more effectively in their lives both inside and outside of school.

Duties:
A tutor provides support to a student by:
1. Committing to a regular tutoring session schedule. Notifying site supervisor and student if unable to come.
2. Help individual students or small groups with homework or other learning activities.
3. Motivate students to improve study skills, self esteem and goal attainment by making learning exciting, relevant and fun.
4. Completing tutoring log describing session activities and student progress.

Qualifications:
1. Basic knowledge of reading, writing and math skills
2. Ability and desire to motivate young people to improve their academic skills
3. Effective communication skills
4. Dependability and patience

Time Commitment:
1 tutoring session per week, 2 hours per session
M-F b/t 3 and 6 pm

Benefits:
Getting to know and interact with cool young people
Learn tutoring skills and activities
Help a young person succeed.
Fulfill service learning requirements

Training:
Orientation and 1 day of training is required. Ongoing tutor training is available.

United Way
United Way of King County

Volunteer Position Job Description - Sample

Excerpted from Joanne Fritz, Your Guide to Nonprofit Charitable Orgs.

Job Title: Day Chair

Purpose: The position of Day Chair serves as the receptionist for the Charles County Agency on Aging, supporting the Agency's mission of supporting the elderly population of Charles County. The Day Chair represents the agency to the public who visit the agency's offices Monday, Weds, and Friday from 9 a.m. - 4 p.m.

Location: The Day Chair works in the public reception area of the agency's main office

Key Responsibilities:

- The Day Chair answers the main phone line and directs calls.
- Greets guests and directs them to other offices or locations.
- Answers questions about the agency and provides forms when necessary.
- Prints out a list of daily activities at the agency's offices and satellite locations.
- Makes reminder phone calls to other volunteers who are assigned to projects for the following day.
- Opens the mail and distributes it.
- Records donations that come in and enters them in the database.
- Proofreads brochure copy when time allows.
- Helps prepare bulk mailings.
- Prepares correspondence as needed.

Reports to: Assistant Director of the Charles County Agency on Aging

Length of Appointment: One day per week for a period of three months. After three months, the Day Chair may be reappointed for another three months at the discretion of the supervisor. After six months, the person who is serving as Day Chair may rotate to another position within the agency.

Time Commitment: One day per week (M, W, or F) for six hours (9-12 am and 1-4 pm), for a minimum of three months.

Qualifications: Basic knowledge of computer and data entry. Pleasant manner, patience, problem-solving ability, dependability.

Support: Training for this position will be provided. In addition, the Assistant Director will be available for questions and assistance.

Age Requirement: None

Other categories that might be included on a volunteer position description are:
- *certifications/licenses required, i.e. CPR Certification, Commercial Drivers License, etc.*
- *development opportunities, i.e. training for other positions. etc.*
- *security checks required, i.e. criminal history check, fingerprint check, etc.*
- *benefits, i.e. certificate of service, free parking, tuition remission, etc.*
- *Dress Code*

Fact Sheet:
Designing Effective Volunteer Positions

Well-designed volunteer positions ensure that volunteer programs contribute to the achievement of their organization's goals. A plan for involving volunteers allows volunteer programs to recruit from the pool of volunteers available in the community and to engage them in ways that effectively utilize their skills. Designing volunteer positions also plays a role in the strategic planning process of the volunteer program as well as the overall organization. Once designed, periodic reviews of volunteer positions and tasks help volunteer program planners make volunteer roles more effective and mission-oriented.

Turning the knowledge gained from developing volunteer positions into written volunteer position descriptions can also simplify some of the most challenging aspects of a volunteer coordinator's job- marketing, recruiting, screening, and training volunteers. Position descriptions can serve as a tool for recruiting people with the right interests, skills, and availability, and matching those individuals successfully with volunteer positions. Position descriptions make clear the volunteer's responsibilities to everyone- staff, volunteers, and volunteer coordinators- which simplifies supervision and clears away many areas of potential conflict.

Position Description Form Tips:

· View the volunteer position from the perspective of the volunteer.

· Is the program targeting the position towards potential long-term volunteers or episodic volunteers?

· Is the position meant to take advantage of the skills of a professional volunteer?

· Is it asking for multiple volunteers with varying experience that the program will train? Is the traning component clearly offered?

· Will the position directly meet a need within the community?

· Will the position clearly support the work of the staff of the organization?

· What aspects of the position will most appeal to the selected volunteer pool: episodic, student, senior, etc?

· Are the benefits displayed prominently within the position description in order to enhance its attractiveness to potential volunteers?

Using Position Descriptions

The volunteer screening process is strengthened by well-written volunteer position descriptions. Early in the volunteer intake process, volunteers can use volunteer position descriptions to screen themselves by applying only for those positions for which they have the skills and interest.

A position description can also be a useful tool in the volunteer interview process. Volunteer Coordinators can easily prepare interview questions for each volunteer position because they have explored the needs of the organization and have outlined the major skills needed for each volunteer position. Having a ready list of interview questions for each volunteer position simplifies future interviews.

In the interview a volunteer coordinator will look for the applicant's

·   Interests.

·   Constraints, when relevant-for example, afraid of heights.

·   Working style-for example, relative to supervisor, other staff, and other volunteers.

·   Expectations.

When looking at this list, observe how the position description actually helps in the interview process. Before a volunteer even walks into the office, a well-written position description will have targeted volunteers most interested in the position to be filled, will have explained requirements which would help volunteers self-select themselves away from constraints, would have explained both supervision and evaluation requirements, and would have helped shape the volunteers expectations in terms of the purpose and benefits of the volunteer positions.

Time Saver: Create a list of interview questions for each volunteer position and keep them on file with a copy of the position description. When it's time to conduct an interview, share the position description and list of interview questions with the person who will conduct the interview. Using standardized interview questions will bring consistency to your screening process and simplify preparations for the interview.

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Volunteer Position Description Worksheet

Title/Position: _____

Goal of Position: _____
_____
_____

Sample Tasks/Activities: _____
_____
_____

Timeframe: _____

Length of commitment: _____

Estimated hours/month: _____

Scheduling: • **at discretion of volunteer**
              • **at specified times:**

Worksite: _____

Qualifications sought: _____
_____
_____

Training required: _____

Benefits: _____

Supervised by: _____

Name: _____

Title: _____

Phone: _____

Drafted by:
Date:

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3

Marketing and Recruitment

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The Moral Obligation of Volunteer Recruitment Promises

By Susan J. Ellis

Recruiting volunteers to contribute their time and effort to your organization puts *you* in the middle of an implied promise. By issuing the invitation to participate, you are representing that volunteers 1) will be working towards a meaningful mission and 2) will be valued partners in that work. When new people agree to volunteer, they initially commit because they believe in the genuineness of that invitation. Which means they believe you and respond to your sincerity.

So recruitment sets up a moral obligation for each of us.

What happens, therefore, when a little voice in the pit of our stomach nags at us with thoughts such as: "Oh, dear, what if this volunteer ends up in X department where the staff is so negative?" or "Will the risk manager argue against allowing volunteers to do it the way they want?" or "What will they think when they realize volunteers are taken for granted here?"

It's probably safe to assume that each of us believes in the mission of our organization – that its ultimate goal is truly worthwhile and its services of benefit to recipients. (If not, it's time to change jobs. Really.)

But it's not enough to engage volunteers solely because of the importance of the long-term goal. For many organizations that goal is decades away, if attainable at all. None of us will wipe out all diseases or hunger in our lifetimes. And not all missions are to end something. A museum or a park expects to continue forever, give or take a century. But *how* an organization treats its participants (employees, volunteers, and clients) matters every single day, right now.

This means that it's imperative to create the most welcoming and productive environment for everyone – for the long haul. That's why a leader of volunteers is ethically bound to tackle any issue that violates the promises made in recruitment.

In my opinion, we have an ethical dilemma whenever we find ourselves:

- Working around resistance from paid staff (or veteran volunteers) rather than confronting and changing it.

- Seeing that there are no consequences when employees are unsupportive of volunteers and, maybe worse, that there are no rewards for doing a great job with volunteers.

- Accepting restrictions on what volunteers can and can't do that are created under negative, outdated, or otherwise wrong stereotypes about who volunteers are and whether they can be trusted.

- Allowing volunteers to be invisible or of lowest attention on organizational charts, in agency brochures, in annual reports, on Web sites, etc.

- Watching donors of money receive adoration while donations of time and talent are undervalued – except for members of the board of directors, who are rarely acknowledged *as* volunteer.

These sorts of concerns – which are rampant – ought to trouble us not just because they are frustrating and irritating to us in our jobs, but because they are symptoms of a disconnect between the organization's stated desire for volunteers and its basic attitude towards them.

If you've worked at improving these sorts of fundamental indicators of whether an organization values volunteers and you're making progress, fine. But if these issues continue or multiply, can you in good conscience continue to recruit new volunteers into the organization? If your values about community engagement are clearly in conflict with those of the organization (or its leaders), are you not being dishonest in the promises implied in recruitment? Is it time to change jobs?

Most of us need our jobs. I am not being cavalier in suggesting that resigning is an easy thing to do. And I'm not recommending that anyone threaten to resign as a strategy to get attention to frustrating problems. I am, however, urging honest advocacy. We can make it clear to our executives that we will not mislead potential volunteers nor place them into unreceptive units. We can point out the consequences when lip service about wanting volunteers is not backed by tangible support. We can even be up front when we recruit, telling prospective volunteers about the challenges they may face and offering them the chance to partner with us in changing the organization for the better.

A volunteer can find many organizations with which to affiliate and do good in the world. What right do we have to ask people to choose our organization if they will be unfairly limited or have to navigate an obstacle course? We are cheating them by wasting the full potential of their time. And, ultimately, we are cheating our whole society by squandering talent resources. I truly believe that this is not a grandiose overstatement. What do *you* believe?

- Have you had to confront a personal ethical dilemma in your work with volunteers? How did you handle it?
- What else might place your values in conflict with those of the organization?
- What are some other suggestions for handling such situations?

Before You Recruit Volunteers

From Joanne Fritz,
Your Guide to Nonprofit Charitable Orgs.

Make sure that you understand your nonprofit's culture and work environment. Each organization has a certain personality. Often this is set by the demeanor and philosophy of the director.

For instance, is your organization formal in the way it sets up boundaries and chains of command? Or is it open, friendly, creative, or value driven? Perhaps it is chaotic and free flowing. Are employees serious or relaxed, humorous and friendly, or stiff and cold? Is the situation stable with employees feeling secure in their jobs, or is it anxious and unstable with everyone worried about their future? Is this a place you would recommend to friends or family as a good place to work or volunteer?

Make the match between culture and volunteer.

Hopefully, your organization is pleasant and friendly, but with clearly structured processes and expectations. In any case, your organization's culture will determine the type of volunteer you recruit. If your office is hierarchical, you may want to find people who are comfortable following procedures and policies. If it is loosely organized or entrepreneurial, you will want to look for individuals who are self-starters and who enjoy working with less structure and direction.

Analyze your workplace before you recruit volunteers so you will be able to make a better match between volunteers and organization.

Make sure your organization is prepared for volunteers.

Does top management support volunteer work and appreciate the value volunteers can bring? Are the staff prepared and willing to help with interviewing, orientation, training, and supervising volunteers? Have volunteer placements been thought out and defined? Are there volunteer position descriptions in place? Have you prepared recruitment materials such as brochures, flyers, and a volunteer handbook? Is there a place for volunteers to work with necessary supplies and available equipment? Are there policies, procedures and record keeping systems in place?

Resolve legal issues

Have you resolved any legal and liability issues pertaining to volunteer involvement? Are there systems are in place for evaluating the performance of volunteers and the outcome(s) of volunteer initiatives?

Prepare the staff.

Is staff ready to respond to the inquiries of potential volunteers and can they speak knowledgeably and enthusiastically about the mission and work of the organization?

Even when no specific recruiting has been done, your organization may receive inquiries from potential volunteers. Make sure that everyone in the office who receives calls from people expressing an interest in volunteering knows who is in charge of volunteer management and is prepared to transfer the call or forward a message. Never ask a volunteer to call back!

Educate staff to recruit volunteers.

Many of your organization's employees are in contact with potential volunteers every day. Do they know about the range of service opportunities available in your organization and where to refer individuals who express an interest in volunteering?

Once you understand your organizational culture and have all of your systems in place, it is time to get on with your recruitment plans.

Recruiting Volunteers:
Three Approaches

United Way
United Way of King County

From Joanne Fritz,
Your Guide to Nonprofit Charitable Orgs.

There are numerous methods you can use to recruit volunteers. However, not all of them will be appropriate for your organization or your specific needs.

Rick Lynch and Steve McCurley, authors of *Essential Volunteer Management,* (Heritage Arts Press) suggest that there are three basic ways to recruit:

Warm Body Recruitment

When you need a large number of volunteers for a short period time and the qualifications of the task are minimal, you might engage in "warm body recruitment." This involves a broad dissemination of information, including:

- Distribution of brochures
- Posters
- Speaking to groups
- Notices in appropriate media
- Word of Mouth

Targeted Recruitment

The targeted campaign requires a carefully planned approach to a small audience. Use this method when you are trying to recruit volunteers that need to have specific skills or not commonly found characteristics.

A targeted campaign requires, at the outset, that you answer several questions:

- What do we need?
- Who could provide this?
- How can we communicate with them?
- What would motivate them?

Working through such questions will help you identify and locate the volunteers that you need. Once you locate a source of such volunteers, simply take your recruitment message directly to them.

Concentric Circles Recruitment

This type of recruitment requires you to identify populations who are already in direct or indirect contact with your organization and then to contact them with your recruiting message. Such populations include:

- Your clients, their families and relatives.
- Alumni of your program/s.
- Friends of your current volunteers and staff.
- People in your organization's neighborhood.
- People who have been affected by the problem you are attempting to solve.

Concentric Circles recruitment involves people who are already familiar with your agency or the problem you address, or who are connected through friends or staff members. It is more likely that you will succeed in persuading them to volunteer than complete strangers. In sales terms, there is a big difference between a "cold" call to a stranger than a "warm" call to an acquaintance or a friend.

Your Recruitment Message

No matter which recruitment method you use, you must have a compelling message. Your message explains why your agency is worthy of a potential volunteer's time. Make your message short, simple, and direct, communicating the need for the volunteer's service and the good he/she can do. Stress the need of the community for the service, but also delineate the benefits the volunteer will receive. These include doing good, but there may be skills and valuable experience that the volunteer will gain.

Asking

Finally, be sure to directly ask people to volunteer. The most effective way to do this is to have your staff or volunteers ask their friends and acquaintances to volunteer. Be sure to provide them with the information they need to make an effective "ask."

This About.com page has been optimized for print. To view this page in its original form, please visit:
http://nonprofit.about.com/od/volunteers/a/recruitvols.htm

SEVEN KEYS TO RECRUITMENT

"I am going to spend a minimum of time and attention on this subject because I truly believe the best recruitment tools are a good, sound volunteer program and meaningful jobs" Marlene Wilson, The Effective Management of Volunteer Programs, p. 115

Following are the "general suggestions" offered by Marlene Wilson, excerpted from pages 115 to 118.

1. Do specific rather than general recruiting whenever possible
   a. Chose appropriate audiences whose interests and priorities match your needs:

   b. Determine where the skills are that you need and actively seek them out.

   c. Be as specific and honest in your appeal as possible.

2. Have a year round recruitment plan.

3. Utilize a variety of recruitment techniques.

4. Be sure to utilize the services of local Volunteer Centers and Retired Senior Volunteer Programs.

5. Recruit by inviting people to respond to the opportunity to volunteer, not by telling them they ought to be concerned and involved.

6. Be enthusiastic!

7. Expand opportunities to volunteer to all segments of community.

United Way of King County

"If you're not looking for anyone in particular, don't be surprised when no one in particular shows up".

Targeted recruitment is almost always more effective than blanket recruiting
Regardless of the number of volunteers needed and function the volunteer(s) will serve, target your audiences and break your recruitment efforts into "mini-campaigns," which can be delegated to various people.

<u>**Steps of targeted volunteer recruitment:**</u>
Follow these steps for each job individually.

1. Write a volunteer job description— you need to know exactly what you want the volunteer to do. They work for you. You shouldn't have to spin your wheels trying to find or make work for them.

2. What skills and qualities are needed to perform this job (the more specific, the better).

3. What types of people are most likely to have these qualities? (e.g., age, gender, availability, educational level, experiences, etc.)

4. What are the best sources for finding my needed volunteers? Brainstorm this with someone else. Remember: *there are no rules for where you can and can't recruit volunteers.* Be creative!
   a. delete those items that aren't feasible (but don't delete anything just because it is unusual).
   b. prioritize those that remain.
   c. localize this list (name *specific* companies, stores, clubs, groups, etc. You can use the yellow pages or internet to help you here).
   d. prioritize this list. Consider:
      i. which are linked to your organization in some way?
      ii. does anyone at your organization have a contact there?
      iii. is there some other appeal of this target?

5. What techniques or methods would be most appropriate to gain access to them? Speak their "language".

6. What benefits will these volunteers receive by doing this job? Consider your arrangement an *exchange* (e.g., work experience, networking opps, etc.).

7. Who is the best person to do this recruitment and why?

TARGETED RECRUITMENT PLANNING

Volunteer Position: _____

What are the skills/attitudes needed to do this job?
(If we draw a picture of the type of person who could do this job and would enjoy doing it, what would they look like? Cover age, sex, hobbies, possible occupations, related interests, and whatever else better illustrates the picture)

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

Based on this picture, where can we find these types of people?
(Think about work setting, educational background, leisure time, organizations and activities, publications they might read, parts of town in which they are likely to live, etc)

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

What Motivation of this person can we appeal to in our recruitment effort?
(Self-help, job enhancement, socialization, learning new skills, career exploration, leadership testing, giving back to the community, keeping productively involved, meeting new people, etc)

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

VOLUNTEER RECRUITMENT MESSAGE

1. Why should this job be done at all? What is the need in the community for this work? What bad things will happen if this job is not done? Use both statistics and examples to illustrate the harm or problem area.

_____

_____

_____

_____

2. What will the benefit be to the community or to the client if the job is done? What will the work accomplish? What changes will it make in their lives? What will the volunteer be able to accomplish if they accept the job?

_____

_____

_____

_____

3. What are some possible fears or objections concerning this job which must be overcome? The type of clients? The subject area? The skills needed to do the work? Geography? Liability?

_____

_____

_____

_____

4. What will be the personal benefit to the volunteer in doing the job? Skills? Experience? Flexible work schedule? Parking? New Friends?

_____

_____

_____

_____

United Way of King County

HOW TO WRITE NEWS RELEASES FOR RECRUITING VOLUNTEERS
- Recruit a volunteer with a public relations background
- Use human interest stories ("Can you make hamburgers and dish out ice cream for children's lunches?" might bring better results than "volunteer cooks needed".)
- Make news releases as personal as possible
- State appeals to the public so individuals feel they are essential to the functioning of the program
- Make job descriptions appealing and interesting
- Be as brief as possible
- Be honest, particularly about the time and training required for the job.
- List a contact person who is easy to reach

HOW TO BE MORE CREATIVE IN RECRUITING VOLUNTEERS
- Get all active volunteers involved in thinking up new methods for recruiting. Pool staff ideas.
- Use every available source – radio, television, newspaper, AND personal contacts.
- Mail out a preference questionnaire to past volunteers, clients, newcomers to the community, etc.
- Have a series of coffees and have current volunteers tell their story and inspire others to volunteer
- Plan well and know what your are recruiting for!
- Develop creative and attractive materials
- Have an agency WORK DAY, and ask current volunteers to bring a friend to get to know the agency and the volunteers and staff.
- Always be enthusiastic in whatever approaches you use.

HOW TO CONTACT CLUBS AND SERVICE GROUPS
- Use attractive mail-outs followed by phone calls.
- Develop a "contact" within clubs and let that person work for you.
- Develop interesting presentations – most clubs are constantly looking for programs
- Send and invitational letter to groups asking them to visit your office and view your program
- When making presentations, take a volunteer along who can personally talk about the benefits of volunteering

HOW TO SEEK OTHER THAN THE "USUAL" VOLUNTEER
- Reach out to specific groups such as carpenter unions, minority groups, sewing clubs, etc.
- Publicize special needs in newsletters that reach unions, senior citizens, etc.
- Utilize church bulletin and business and professional publications
- Become knowledgeable about community resources, and try to work with all kinds of groups.
- Place attractive literature in doctor's offices, Laundromats, grocery stores, etc.
- Develop specific jobs that will be attractive to non-traditional volunteers.

HOW TO GET MORE MEN INTERESTED IN DOING VOLUNTEER WORK
- Be organized and efficient with specific jobs in mind
- Be business-like in approach.
- Have jobs that will be of interest to men.
- Recruit in private industries and businesses.
- Retired executives (both male and female) make excellent volunteers
- Include in your presentations information that documents the benefits your agency provides to the community.
- Don't overlook the fact that men can effectively be approached through human interest stories too.

ADDITIONAL SUGGESTIONS
- The best volunteer recruiters are volunteers who were happy in your agency.
- People are attracted to programs that utilize positive, honest, enthusiastic appeals.
- Be interested in your volunteers and what makes them happy. Be flexible in matching volunteers to the right job.
- Don't over-recruit- volunteers may lose interest if they have signed upt to help you and there isn't a job for them.
- Recognize volunteer's efforts.
- Involve volunteers in policy setting sessions – make certain they feel they are an integral part of the agency.
- Assure potential volunteers they will be provided with adequate training and supervision.

Feature VS Benefits Oriented Marketing

United Way of King County

Feature Based Message:

Summer Tutoring with United Way of King County's Summer Camp (*fictitious*)

We serve 250 children each summer with our summer tutoring program. Every day, each child will receive 2 hours of direct work in a small group with a tutor while also working with a larger group during their art and exercise time. Every tutor will be responsible for 15 kids and be planning and scheduling the daily break activities as well as preparing curriculum for each week. The volunteers will also be committing to spending 4 hours each day for three weeks with the children in the program functioning in a lead tutoring role.

Benefits Based Message:

Summer tutoring with United Way of King County's Summer Camp:

Come and enjoy the beautiful summer weather of the NW by providing at risk kids with a place to play & learn. You can add a valuable skill to your resume in a supervisory tutoring role while also spending some time with great kids. You will get to work with experienced tutors developing curriculum, structuring free time and planning arts, crafts and exercise times. You may not think you have the gifts, skills or ability to work with kids but the smallest amount of time and effort can change a child's future as well as your own. We invite you to take some time out of your busy schedule to give kids a 3 week oasis this summer by planning on being a Summer Tutor at our "Adventure Camp".

Marketing Your Volunteer Opportunities

Where to Market Your Volunteer Opportunities

- City and neighborhood newspaper volunteer listings
- Paid ads
- Human interest stories on your program in print or broadcast media
- School newspapers
- Professional association and club bulletins
- Senior center bulletins
- Employee newsletters
- Church bulletins
- Other "specialty" publications
- Radio and TV PSAs
- TV "People Helper" type features
- TV or radio "volunteer-a-thon"
- Cable TV message boards
- Celebrity spokespersons
- Yellow page ads
- Posters on community bulletin boards (library, grocery stories, Laundromats, community colleges, community centers)
- Online listings
- Company e-mails
- Local electronic bulletin boards
- "Bring a friend" events
- Open house/ agency tours
- Short, upbeat talks at community or professional organization meetings
- Public talks/education/ demos on area of service
- Public recognition of your volunteers
- Volunteer fairs
- Partner with other agencies for publicity during Volunteer Recognition Week
- Booth at community events/fairs
- Local clergy
- Recruitment services through United Way, RSVP, Seattle Works, etc.
- Community Education Classes
- Articles in your organizations newsletter
- Enclosure or "mention" in agency fundraising literature
- Special announcements at agency fundraising events
- Service learning programs
- Court-ordered community service programs
- Americorps program
- Use your current clients, staff, board and volunteers to recruit
- Online community calendars (public library)

List compiled by Nan Hawthorne, Volunteer Voices.

RECRUITING VOLUNTEERS
FOR DIFFICULT POSITIONS

One of the biggest trends in the volunteer sector is the shift towards more "short-term" volunteer involvement.   Yet there are many jobs that cannot be done well by short- term volunteers. There are jobs that demand either high commitment levels or high time commitments. Examples of these types of positions include:
- Leadership positions (Board and committees)
- Emotional bonding positions (youth mentors)
- Time-intensive positions (jobs that require intensive training or screening)

Here are a few possible ways to approach recruiting volunteers for difficult positions:

Redesign the job:
Take a hard look at the job and see if there are ways to split up and divide the job into smaller chunks or unit. Or perhaps the job is to complex and the organization might consider turning it into a paid position.

Practice Saturation Marketing:
Increase your marketing and recruitment efforts to reach out to new and different audiences.
1. Mass media recruitment: Place and ad on the television or radio and in local newspapers
2. Targeted Recruitment: Devote time to figuring out what audience to actively recruit for the position. Ask "who would really like this position" and then track them down.
3. Concentric Circles Recruitment: Begin with recruiting from populations already familiar with your organization and work and then work outwards. Look to former clients, volunteers, staff, etc.

Gang up on the job:
Assign the job to several persons.
1. Team volunteering- the classic job sharing approach. 2 or 3 volunteer share the position and can split up the time and work requirements. Or assign a lead volunteer with an assistant that helps to carry out the job responsibilities.
2. Cluster Volunteering- Recruit an entire group as the volunteer unit. The group sub-divides the work, lessening the time burden on any single member.

A JC Penney survey of volunteer involvement found that 71 percent of non-volunteers indicated that they would be attracted to opportunities in which they could work with their friends. Team or cluster volunteer opportunities would likely be more attractive to people wanting to volunteer with friends and family.

Ease them in:
Many volunteers may just need time to become acquainted with the requirements and the organization to be sure that it is a good fit for them. Try introducing the volunteer to the position more gradually.
1. Test driving- offer the volunteer a 30 day trial period
2. Apprenticeships- place the volunteer in an apprentice role- working as an assistant to the volunteer currently responsible for the position. This can help build confidence in the new recruit because they will have the opportunity to learn the job before being assigned full responsibility for accomplishing the work.
3. Propinquity- Recruit the volunteer for a different position that is near or connected to the position you would like to fill. This approach allows an individual to become familiar with a position before being asked to consider taking on the position.

Conclusion
According to Steve McCurley, there is an additional method for recruiting volunteers for difficult positions: ensure that all short-term volunteers find their volunteer work so rewarding and fun that you end up with likely converts. Short-term volunteers can convert to long-termers! Find opportunities engage short-term volunteers by developing a series of "entry-level", short term jobs that provide an opportunity for prospective long-term volunteers to see how they like working with your agency. Make sure the short-term jobs are enjoyable to the volunteer. People will stick around if they enjoy the work.

"*The best method for recruiting for difficult positions may simply be the old stand-by – effective volunteer management"* Steven McCurley

Screening and Placement

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SCREENING

By Charles Tremper and Gwynne Kostin
From *No Surprises: Harmonizing Risk and Reward in Volunteer Management, 2nd ed.*

Unless you accept everyone who walks in off the street, you are already screening. Using a structured procedure replaces haphazard, and potentially arbitrary, decisions with a fair and defensible method. Methodical screening doesn't eliminate reliance on your gut feeling; you may subconsciously pick up clues about a candidate's suitability. You can leave room for intuition in your selection process, but use it as a basis for further inquiry.

As the sensitivity of the volunteer assignment increases, the need for multiple and more thorough screening procedures rises. At the low risk end of the spectrum is a volunteer who assists each week in copying and filing newspaper clippings or someone who helps organize groceries for the food bank. At the high risk end is a guardian for an elderly person with Alzheimer's disease or a mentor for a child in a program involving unsupervised overnight visits at the mentor's home.

Using multiple screens increases your chance of finding the best volunteers and rejecting the worst. Layered screening procedures may expose people who aren't telling the truth by revealing inconsistent responses. In addition, the thoroughness of the process may discourage applicants with something to hide.

Some people are afraid that extensive screening will scare away potential volunteers. Fortunately, many successful programs have demonstrated that thorough screening can be done. Most candidates will understand the reason for a thorough process when you explain your organization's concern that clients be served and protected. Once again, open communication is key.

When dealing with vulnerable populations screening volunteers before placement is not enough! Research has found that convicted child abusers were amazed at how readily they were placed. They were even more amazed that they were unsupervised as they carried out their volunteer work while sexually abusing children. Build ongoing supervision, training, and evaluation into your program. Help employees, other volunteers, clients, and their guardians to recognize and report suspected abuse.

Screening Guidelines

- Use the position description to evaluate the responsibilities of and supervision for the position. This analysis provides the basis for developing appropriate screening procedures.

- Gather all of your data before making a judgment. If something seems fishy to you, ask the applicant for an explanation. Be sensitive to cultural differences and your own assumptions. Remember, the goal is to recruit the best people, even if they aren't just like you.
- Ask the same question in different ways and get information from multiple sources. For example, you can trace an applicant's employment record during an interview and then call former employers. Verifiable information, like a driving record, can give you insights that an interview won't provide. Later on you can line up all the answers and see if the dates and locations match.
- Include others in the process. One person may pick up signals that the other misses. Consider peer interviews or group sessions. Caveat: Limit the number of eyes that have access to sensitive or private information. Only those staffers with a legitimate need to know should review criminal and financial records, for example.
- Be realistic. Be flexible. Weigh the thoroughness of the screening technique against the responsibility of the position. For example, a youth-serving organization may want to sponsor a mentoring program that includes overnight visits. If the group doesn't have the resources to screen each volunteer thoroughly, it may revise the program to prohibit unsupervised contact.
- Don't collect information you can't evaluate. Ask yourself what you will do with the information. Some organizations set up elaborate interviewing processes or use personal-style tests such as Myers-Briggs and don't know an E-N-F-P (extroverted, intuition, feeling, perceiving) from a J-E-R-K.
- Make sure the information you gather is really necessary and appropriate to the duties. Do you need to fingerprint someone who referees a fundraising basketball game?
- Be consistent. If background checks are important enough for some volunteers, they are equally important for all volunteers performing the same tasks. Failing to screen board members, prominent citizens, or others assumed to be suitable invites disaster.

Every screening technique has pluses and minuses. For example, criminal records checks are an important element of the screening procedure because they can eliminate known offenders and scare away people who have been convicted of target crimes. Nonetheless, criminal records checks identify relatively few abusers. If a position is sensitive enough to need a criminal records check, use that check in addition to other information you gather.

Don't make the mistake of believing that a program is too valuable to let thorough screening get in the way. Although screening procedures may seem daunting, keep your focus on protecting the people you serve and fulfilling your mission. And be creative. Maybe a psychology instructor at a local college would volunteer to help design and implement your procedures.

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Excerpted from No Surprises: Harmonizing Risk and Reward in Volunteer Management, 2nd ed, by Charles Tremper and Gwynne Kostin, © 2001, Nonprofit Risk Management Center.

Found in the Energize website library at: http://www.energizeinc.com/art.html

10 Steps to Safe Screening

United Way of King County

*Excerpted from The Topics and Resource pages on **Volunteer Canada's website:***
http://new.volunteer.ca/en/resources

1. **Determine the risk**
   Organizations can control the risk in their programs. Examining the potential for danger in programs and services may lead to preventing or eliminating the risk altogether.

2. **Write a clear position description**
   Careful position descriptions send the message that an organization is serious about screening. Responsibilities and expectations can be clearly set out, right down to the position's dos and don'ts. A clear position description indicates the screening requirements. When a volunteer changes positions, the screening procedures may change as well.

3. **Establish a formal recruitment process**
   Whether an agency posts notices for volunteer positions or sends home flyers, they must indicate that screening is part of the application process.

4. **Use an application form**
   The application form provides needed contact information. If the volunteer position requires other screening measures (medical exam, driver's record, police records check), the application form will ask for permission to do so.

5. **Conduct interviews**
   The interview provides not only an opportunity to talk to the potential volunteer about their background, skills, interests, and availability, but also to explore any doubts about the suitability of the candidate. In other words, the interview will help determine the "right fit".

6. **Follow up on references**
   By identifying the level of trust required in the position and asking specific questions, the applicant's suitability may be easier to determine. People often do not expect that their references will be checked. Do not assume that applicants only supply the names of people who will speak well of them.

7. **Request a Criminal Background Check**
   A Criminal Background Check is just one step in a 10-step screening process. Criminal Background checks signal — in a very public way — that the organization is concerned about the safety of its participants.

8. **Conduct orientation and training sessions**
   Screening does not end once the volunteer is in place. Orientation and training sessions offer an opportunity to observe volunteers in a different setting. These sessions also allow organizations to inform volunteers about policies and procedures. Probation periods give both the organization and the volunteer time to learn more about each other.

9. **Supervise and evaluate**
   The identified level of risk associated with a volunteer position will determine the necessary degree of supervision and evaluation. If the risk is great, it follows that the volunteer will be under close supervision. Frequent feedback in the first year is particularly important. Evaluations must be based on position descriptions.

10. **Follow up with program participants**
    Regular contact with participants and family members can act as an effective deterrent to someone who might otherwise do harm. Volunteers should be made aware of any follow-up activities that may occur. These could include spot checks for volunteers in high-risk positions.

RISK: Chance of loss (injury, damage, etc.)

LOSS:

       To people, property, income or goodwill

NEGLIGENCE:

       Failure to use "reasonable care" to prevent loss.

REASONABLE CARE: The level of care which would be used by a reasonably responsible person in the same situation.

STANDARDS: Formal or informal guidelines as set by law, communities or organizations.

     Legal Standards: Set by law

     Community Standards: "Unwritten rules we all know, also societal
         standards

     Organization Standards: Policies and procedures set by an organization to govern its actions.

LIABILITY: Something for which one is responsible; an action, debt or legal obligation

United Way | **Risk Management Strategies for Legal Screening**

United Way of King County

Risk Management Strategies:

- Always base screening processes on the potential risk posed by a position. Begin your screening process by considering the potential dangers inherent in the position. For example, a position that will have one-on-one contact with vulnerable service recipients or the general public poses greater risk to these populations than a clerical position with light typing duties and no public contact.

- When a position involves unsupervised contact with vulnerable service recipients, use a more rigorous screening process. The determination of whether a screening process will be considered reasonable will take into account the level of risk to service participants.

- Before screening for a particular position, identify the characteristics that will act as automatic dis-qualifiers for the position. For example, determine that one or more moving violations during the past five years will disqualify an applicant for the position of van driver.

- Whenever a basic screening process raises red flags about an applicant, you should investigate the issue to determine whether it disqualifies the applicant.

- Do not disqualify applicants based on their beliefs. Conduct, not ideas, is an appropriate basis for exclusion.

- If appropriate, when a disqualifying characteristic is detected in an applicant for a volunteer position, consider the applicant for another position.

- Establish written screening guidelines and use written tools to substantiate your efforts, such as position descriptions, interview guides, hiring checklists, reference check worksheets, and other items as appropriate.

- Determine whether a license is required for each position, and confirm that every applicant has the required license before proceeding with additional steps in the screening process.

- Evaluate the sufficiency of your screening processes using the reasonableness standard. Is the process used to screen applicants for volunteer positions reasonable under the circumstances? Is the process used to screen applicants for paid positions reasonable under the circumstances?

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PURPOSE: To Recruit, screen, match

Your questions should:
- Welcome/inform the applicant
- Get a sense of the volunteers personality
- Uncover motivations
- Discover skills, experience, what does the volunteer want to share
- Help make the "fit"
- Explore new information you discover while interviewing

Remember to ask "open ended" questions (no "yes" or "no" answers).

Who will do the interview? What abilities/knowledge should they have?
Where and when will the interview take place?

Preparation
1. Application
2. Position descriptions
3. Interview questions appropriate for each position

Beginning
1. Welcome
2. Build rapport
3. Information on the agency
4. What questions do you have about the agency?

Body
1. Applicant's interests, abilities, information
2. What volunteer positions does the agency have available?
3. Which ones interest the applicant?
4. Requirements for the position

Close
1. Making an offer, or
2. Redirection
3. Explain what happens next

INTERVIEW DO's and DON'T's

DO:

A. Question all candidates in an objective manner. Assure that questions are job related and allow an outline which guarantees similar questioning of all applicants.

B. Develop general questions which require an extended response beyond a simple yes or no.

C. Conceal you reactions to questions or statements from the applicant, guarding against both verbal and nonverbal clues of your interpretation.

D. Encourage candidates to develop their own responses unless you are using some specific questioning strategy.

E. Work towards eliciting genuinely revealing candidate responses.

F. Use direct eye contact during discussions to promote sincere questions and courteous attention.

DON'T:

A. Develop personal biases, particularly early in the interview

B. Include lengthy, drawn out questions.

C. Move on to the next topic while there still is doubt or uncertainty about the question at hand.

D. Allow candidates to digress or ramble, especially if it is evident that they seem incapable of answering.

E. Humiliate the candidate through stressful questioning unless the question is job related and has a special purpose.

F. Display personal opinions or views in your conversation.

United Way

United Way of King County

Specific Questions to Ask When Checking References

Excerpted from Excerpted from *Staff Screening Tool Kit* By John Patterson with Charles Tremper and Pam Rypkema, © 1994, Nonprofit Risk Management Center.

After verifying the factual information from the application (dates of employment, salary, position title, duties, etc.) there are some direct questions you should ask if the position involves working with children, handling large sums of money, or requires operating motor vehicles.

Working with Children:

How would you describe his/her personal characteristics?

- Probe for immaturity, shyness, introversion, non-assertiveness, indecision, or passive acquiescence.

How would you say he/she relates with children?

- Probe whether or not he/she relinquishes adult role and responsibility, tends to become more like the child, places a premium on one-to-one activities rather than group activities.

Have you ever seen him/her discipline a child? If so, please describe what you saw him/her do?

- The manner in which individuals try to control children's behavior can reveal their true character. Disciplinary techniques used should not be violent or emotionally degrading. They should deal with the issues involved, be constructive, and appropriate for the age of the child being disciplined.

I'd be interested in knowing if you think there may be any problems or conditions that would interfere with the applicant's ability to care for children or in any way endanger the children under the applicant's care.

- These problems include substance abuse, mental or emotional illness, or history of child mistreatment.
- While the reason for this question is obvious, the kinds of information you may receive are not. Listen not only to the words, but also to how the words are said- is there hesitancy? equivocation?

Handling Money:

_____ *has applied for a position that requires handling large sums of money. Are you aware of any problems he/she may have that would cause you concern about entrusting him/her with this responsibility?*

- Listen for general concern about honesty and dependability.
- Ask for specific examples of problems so that you eliminate rumors and gossip.

Are you aware of any financial difficulties, drug abuse problems or history of criminal conduct?

- Follow-up question to the first one with specific focus on known risk factors.

Motor Vehicle Operation:

Have you ever ridden in a vehicle while he/she was driving? If you have, how would you characterize his/her driving?
- Warning flags you should listen for include aggressive driving, pushing the speed limit, recklessness.

Are you aware of any incidence in which he/she operated a motor vehicle while under the influence of alcohol or other drugs?

- Listen for equivocation ("Well he really wasn't under the influence, I mean he had only had a couple of beers"); evasiveness ("No, I don't really know for a fact, that he has ever driven after drinking."); justifications ("Well, hasn't everyone at one time or another.")

United Way of King County

Introduction

The interview is a vital component in the volunteer placement process. In order to place the most qualified applicant, volunteer resource professionals must be well versed in how to effectively conduct interviews. In addition, volunteer resource professionals must be aware of federal and state legislation that precludes them from asking certain questions during and interview

Interviewing Styles

There are different types of interviewing styles. Structured interviewing involves approaching the interview with a pre-planned agenda. The interviewer knows ahead of time what he/she will ask the applicant and tries to stick to the agenda. Some interviewers will ask the questions in order and others will take a more relaxed approach but are still sure to address all of the pre-planned questions. This type of interviewing style generally provides the interview with the information needed to make the hiring decisions. It is also important as a defense against discrimination in selection and placement, because all applicants are asked the same questions.

In an unstructured interview, the interviewer does not have a prepared agenda, but rather allows the applicant to set the pace of the interview. This style of interviewing does not always provide the interviewer with the necessary information. In addition, the lack of structure makes it difficult to compare and rank applicants because they are not responding to the same questions.

In a panel interview, more than one person interviews the applicant. Generally, the interviewers take turns asking questions. Panel interviews can be either structured or unstructured.

Facilitating Open Discussion

Interviewers try to gain as much information as possible from the applicant. The easiest way to accomplish this is by creating an atmosphere that allows the applicant to speak freely. The following are suggestions for fostering an atmosphere that is conducive to open discussion:

1. Try to put the applicant at ease at the beginning of the interview. If the applicant feels comfortable he/she will be more likely to share information with you.

2. If you find that the applicant freezes on a particular question, you may want to go to the next question. It takes time for some applicant to relax and feel comfortable with the interviewing process.
3. Try to ask questions that will facilitate discussion. Avoid questions that require a yes or no answer.
4. Don't ask leading questions. Keep the questions open-ended so that the applicant has the opportunity to speak freely.
5. Be sure to ask only job-related questions.
6. Listening skills are essential in an interview. It is important to let the applicant speak without being interrupted. Remember, the purpose of the interview is to obtain as much information as possible.
7. While the applicant is speaking, watch his/her body language and facial expressions. These expressions will provide you with additional insight about what is being discussed at the time.

Legal Constraints

Federal law regulates the types of questions that can be asked during and interview. For example, Title XII of the 1964 Civil Rights Act prohibits discrimination based on race, sex, color, natural origin, and religion. The Age Discrimination in Employment Act prohibits questions about a person's age. The American with Disabilities Act of 1990, among other things, protects qualified individuals with disabilities from discrimination in employment.

Questions relating either directly to age, sex, race, color, national origin, religion or disabilities should be avoided. If information that you need about an applicant potentially infringes on any of the above categories, be sure that the question relates to a bona fide occupational qualification or is required by law to be asked.

Be aware of some of the specific prohibitions imposed by the enactment of the Americans with Disabilities Act. For example, employers may not inquire about an applicant's workers' compensation history. Also, employers may not ask if an applicant has a disability. They may ask if there is anything that precludes the applicant from performing the essential functions of the position with the applicant so that he/she has the information needed to make that determination.

Interviewers should be well-versed in federal and state law that regulates the types of questions that may be raised in an interview. If your are not sure if a question violates federal or state legislation, you are better off not asking the question and checking with your legal counsel.

Sample Questions

The way in which questions are phrased is very important. The following are examples of acceptable and unacceptable interview questions. The first question is unacceptable and the second one is acceptable.

1.
   No: "Are you a U.S. citizen?"
   Yes: "Are you lawfully employable in the United States either by virtue of citizenship or by having authorization from the INS and the Labor Department?"

2. **No:** "How old are you?"
   Yes: "Are you over the age of eighteen?"

3. **No:** "Do you have any children? What are your child care arrangements?
   Questions about family status are not job related and should not be asked.

4. **No:** "What clubs or organizations do you belong to?"
   Yes: "What professional or trade groups do you belong to that you consider relevant to your ability to perform this job?"

5. **No:** "Have you ever filed a workers' compensation claim
   You may not ask this question or any related question prior to offering the position.

6. **No:** "What disabilities do you have?"
   Yes: "Are you able to perform the essential functions of the job to which you are applying?"(Be sure you tell the applicant what the essential functions are).

7. **No:** "When did you graduate from high school?"
   Yes "What schools have you attended?"

8. **No:** "What is your maiden name"?
   Yes: "Have you ever been known by another name? (Only ask this question if you need to contact a former employer, because a legal liability may exist if the applicant claims that you were trying to determine her ethnic background and consequently didn't place because of it)

9. **No:** "Do you smoke?"
   Yes: "Our smoking policy is such – can you adhere to it?" (Be aware of any state laws that relate to smoking. Some states prohibit an employer from excluding applicants for off the job smoking).

10. **No:** "Do you have AIDS or are you HIV-positive?"
    There is not acceptable way to inquire about this or any other medical condition.

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INTERVIEWS THAT SCREEN:

ASKING THE RIGHT QUESTIONS

Many volunteers have jobs that require some sensitivity to clients, members, or confidential information. Asking the right questions can make a huge difference in the selection and placement of volunteers. The use of Non-Direct questions during an interview elicit key information on a volunteer and his/her background and appropriateness for a job.

Direct	Non-Direct
1. How old are you 2. Have you ever volunteered? 3. What jobs have you held? 4. Are you available on Thursday? *(Some of these might be considered illegal or unimportant depending on the task for the volunteer.)*	1. What personal goals do you consider when choosing a volunteer position? 2. What was the best thing about your last volunteer position? 3. What type of work do you enjoy most?

NOTE THE DIFFERENCE IN THE TWO TYPES OF QUESTIONS

Non-Directive Interview Style:

- Interviewer is catalyst
- Interviewee has more control
- Depth of answer is greater
- Gets at attitudes, motivation, and stability
- Uses silences appropriately

Some possible non-direct questions:

1. What did you enjoy most about your last volunteer positions? Least?
2. What do you enjoy as a leisure activity?
3. What would you like to be doing in 3 – 5 years?
4. What type of people do you enjoy working with most and why?
5. Describe your work habits.
6. What are the most important decisions you have made about your life?
7. What did you like the best about the last work supervisor you had? Least?
8. What would be an ideal volunteer position for you?
9. How do you deal with anger—on the job or in your private life?

Asking the Right Questions

United Way of King County

When selecting questions to ask, there is a broad range you can choose from. Each of these types of questions achieves a different type of outcome for a different purpose. Choose wisely!

Type of Question	Description	Example
Fact-Finding Questions	Targeted at verifiable data such as who, what, where, when, how, and how much. Use to gather information about the current situation.	"What is the new structure of your organization?" "How much training has your team received this year?"
Feeling-Finding Questions	Ask subjective information that gets at opinions, feelings, values, and beliefs. Help you understand views, beliefs, and culture.	"How do you feel about the effectiveness of the new structure?' "Do you think the team feels prepared?"
Tell Me More Questions	Help you get more information. Encourage the participants to provide more details.	"Tell me more?" "Can you elaborate on that?" "Can you be more specific?"
Best/Least Questions	Help you understand potential opportunities in the present situation. Let you test the limits of the participants' needs and wants.	"What is the best thing about the new organizational structure?" "What is the worst thing about the training you have received?"
Third-Party Questions	Help uncover thoughts in an indirect manner. Are designed to help people express sensitive issues.	"Some people find the new structure is too restrictive. How does that sound to you?" "There is concern about not training people enough for their positions. Can you relate to that concern?"
"Magic Word" Questions	Let you explore people's true desires. Useful in removing temporary obstacles from a person's mind.	"If time and money were no obstacle, what type of training would you design for your team?"

From the training session "Beyond Icebreakers and Power Points - Incorporating Principles of Adult Learning into your Training Program" presented by Nancy Henry, Judith Gold, and Nicole Trimble at the National Conference on Service and Volunteerism (June 20, 2006)

Volunteer Application
Sample

United Way of King County

First Name:	Last Name

Address:	Home Phone:

Address 2:	Cell Phone:

City:	State:	Zip:

E-Mail:

Emergency Contact:	Phone:

Relationship:

Do you have any medical conditions that would interfere with your ability to volunteer? Please specify:

I. Skills and Interests

Highest Level of Education:

Current Occupation:	Employer:

Special Training & Hobbies:

Skills: (Check all that apply.)

Please list any additional skills:

Areas of Interest: (Check all that apply.)

Other Interests:

II. Availability

(Please check each day and time you are willing/available to work.)

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Mornings							
Afternoons							
Evenings							

III. References

How did you hear about us?

List Names and Phone Numbers of Two Personal References and One Employer Reference:

1. Name:	Phone:
Relationship:	Length of Relationship:
2. Name:	Phone:
Relationship:	Length of Relationship:

I certify that the information given on this form is true and correct to the best of my knowledge and belief and is made in good faith. Any false statements made by me on this form may result in refusal of or separation from volunteer service upon discovery thereof. Additionally, I understand that during the recruitment process, this organization may contact the references I listed. Finally, submission of this application is not a guarantee of acceptance or placement into the _____ volunteer program. Applicants will be contacted and interviewed for positions available.

Signature:	Date:

Thank you for your interest with our volunteer program! We would not be what it is today without the hard work and efforts of our devoted volunteer corps. We look forward to potentially working with you and appreciate the generous offer of your time and skill.

YMCA of Greater Seattle
PROGRAM VOLUNTEER INTEREST SURVEY

YMCA OF GREATER SEATTLE

We build strong kids,
strong families,
strong communities.

PERSONAL

Last Name First Name Middle Initial	Day Time Phone:
	Evening Phone:
Street Address:	Email Address:
City, State, Zip:	Best time to contact you: By phone or email?:

INTEREST SURVEY

Why are you interested in volunteering with the YMCA of Greater Seattle?
Is there a specific YMCA Branch, site, or geographical area in King County that you'd like to volunteer in?

What program area(s) are you interested in working in?	Other interest areas:	What age groups would you like to work with?
(Note: not all programs are available at all branches)	___ Arts	___ Elementary school and younger (under 11)
___ Teen Leadership & Development ___ Health & Fitness	___ Environment	___ Middle School aged (11 – 14)
___ Child Care ___ Aquatics	___ Education	___ High School aged (14 – 19)
___ Mentoring or Tutoring ___ Member Services	___ Community Concerns	___ Young Adults (18 – 30)
___ Service Learning Opportunities ___ Policy (Boards, Committees)	___ Global/International Issues	___ Adults
___ Coaching or Officiating ___ Clerical/Administration	___ Health & Wellness	___ Older Adults
___ Guest Speaker/Workshop Presenter, Topic(s):	___ Other:	___ I prefer to work with staff only
___ Other:		

Do you have specific skills you would like to share or improve on?
Do you have any interests you'd like to explore?
Do you have previous volunteering experience? Please describe, including organization names:

When are you available to volunteer? (Days, Times)	How often do you want to volunteer? (Ex.: once a month/twice a week/one time events?)
How did you hear about volunteer opportunities at the YMCA?	

STUDENT VOLUNTEERS

Are you looking to fulfill a school requirement or will you receive school credit for your service?   Yes_____ No_____
IF YES, name of school: Are you interested in Service-Learning opportunities? Yes_____ No_____
Number of Hours needed: Deadline to Complete Hours:

COMMUNITY SERVICE VOLUNTEERS

Are you looking to complete Court Ordered Community Service Hours? Yes_____ No_____
IF YES, offense: Number of hours needed: Deadline to complete hours:
Parole/Probation Officer's name: Phone:

Please return to: Samantha Bowes, 4515 36th Ave SW, Seattle, WA 98126   Fax: 206-938-1676
OR to the Volunteer Contact at the appropriate branch, listed at www.seattleymca.org

Washington State conviction criminal history record information (CHRI) is available on the Internet using WATCH.

The release of conviction CHRI is permitted under the Washington State Criminal Records Privacy Act, Revised Code of Washington (RCW) 10.97.050 and under the Child and Adult Abuse Information Act, RCW 43.43.830-43.43.845. All criminal history background check responses include sex and kidnapping offender registration information.

Washington State Criminal Records Privacy Act RCW 10.97.050

Allows dissemination of all convictions and any arrests less than one year old pending disposition. Under Washington State law, conviction CHRI is available without restriction to anyone.

Child and Adult Abuse Information Act RCW 43.43.830-43.43.845.

Provides an applicant's record of convictions and any pending crimes against persons (as defined in RCW 9.94A.411) less than one year old for which the applicant is currently being processed by the criminal justice system. An arrest is not a conviction or a finding of guilt. The conviction record data does not include information on civil adjudications, administrative findings, or disciplinary board final decisions – all such information must be obtained from the courts and licensing agencies. Responses are limited to Washington state records only. Background checks can be requested on **prospective employees, volunteers, or adoptive parents** who will or may have unsupervised access to children under sixteen years of age, developmentally disabled persons, or vulnerable adults. **The background check is for initial employment or engagement decisions only.**

WATCH allows you to request, view, and print conviction CHRI. However, to inquire about a person and to obtain his or her record, you must enter the exact spelling of the person's name and the correct date of birth. Otherwise, the criminal history record may not be found.

What is the cost of conducting a WATCH search?

WATCH allows search reports to be purchased with a credit card or by using an account established with the Washington State Patrol. A $10 fee is charged for each name search, regardless of the result. Pursuant to RCW 43.43.830, non-profit organizations licensed in Washington State are exempt from payment requirements when they are performing searches of convictions for crimes against children or vulnerable adults on prospective employees or volunteers.

What are the WATCH results?

The search will result in one of the following:

♦ A NO RECORD or NO EXACT MATCH FOUND response, which means there is no conviction record in the WSP database that matches the search criteria used.

♦ A Candidate listing, which means there is a candidate list of records that matches or closely matches the search criteria used and the ability to immediately retrieve a transcript of record.

♦ A DUPLICATE MATCH indicating that there were two or more exact name and date of birth matches to the search criteria used. Please contact the Section at (360) 534-2000 for further instructions.

Washington State statute (RCW 10.97.050) requires that the Washington State Patrol, Identification and Criminal History Section, retain information about the dissemination, including subject of inquiry, the name of the person requesting the CHRI, and date of the search.

How can I conduct a search through WATCH?

WATCH can be accessed through any personal computer with access to the Internet. An account number may be established to receive a monthly billing invoice, or you may establish an on-line credit card account and use Discover, American Express, Visa, or MasterCard.

How do I establish an account?

An account application can be printed by accessing WATCH "Forms" on the Web site, contacting the Section at (360) 534-2000, or by sending an e-mail to *watch.hlp@wsp.wa.gov*. A completed application submitted to the Section will be processed within 7-14 days.

What are the limitations when conducting a search using WATCH?

WATCH search results are provided based on a name and date of birth match or close match to a name in the criminal history database. Nicknames, former names, maiden names, and dates of birth will affect responses received. Searches based on name and date of birth are not always accurate.

Positive verification or non-verification of criminal history can be effected only upon receipt of fingerprints. Contact the Identification and Criminal History Section for further information on fingerprinting fees and services.

The Identification and Criminal History Section database may not contain **all arrests and dispositions** within the state of Washington. There may be instances when arrest offenses or court dispositions are not sent to the Section or instances when information may be pending data entry into the CHRI database. Additional information pertaining to an individual may be available at local criminal justice agencies.

Does WATCH provide nationwide information?

No. WATCH only provides Washington State conviction criminal history.

For further information, please contact the Identification and Criminal History Section at (360) 534-2000.

Washington State Patrol
Identification and Criminal History Section
PO Box 42633
Olympia, WA 98504-2633

Washington State Patrol
Criminal Records Division
Identification and Criminal History Section
PO Box 42633
Olympia WA 98504-2633

WATCH

*W*ASHINGTON *A*CCESS *T*O *C*RIMINAL *H*ISTORY

♦ *https://watch.wsp.wa.gov*

♦ *www.wsp.wa.gov*

♦ *http://www.access.wa.gov*

Orientation and Training

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The Role of Trainer for the Volunteer Manager

Among the many roles that volunteer program managers must take on, that of trainer weaves its way through almost all efforts that they undertake.

Beyond the specific "training events" they hold, volunteer managers are constantly teaching, coaching, recruiting, advocating, promoting or acting as consultants....all variations of training. It becomes, therefore, imperative that everyone in our profession understands the critical importance of having the necessary skills and finesse to be a top-notch trainer.

When mapping out training and looking at the critical issues of planning, designing, implementing and evaluating, the most important aspect of successful training may be over-looked or under-appreciated.

That aspect is, of course, the TRAINER!

There is an ongoing debate about which is more important, the material or the trainer. Like the debate regarding the primary importance of the script or the actor, it has no easy answers but this much is certain...if the material and the presenter are top quality, the chances of successful learning for the audience is multiplied a thousand times.

I've seen good trainers take weak materials and by adding additional "meat" turn the training into something very valuable. On the other hand, I have seen poor trainers take excellent material and murder it! Obviously, my bias leans toward the greater importance being on the skill level of the trainer.

You may as well know another bias I hold: That my definition of a great trainer has nothing to do with how theatrical they are or what fluffy tricks of the trade they use. I've sat in sessions where the trainer was highly entertaining but gave no real learning and others where the audience was "exercised" to death, but got very little real information from the trainer and supposed expert.

To me good training is offering the maximum learning in various ways that enable learners to absorb and translate it into use-in-tomorrow skills that help them do a better job back at their desk. It's user-oriented, interesting, honest and practical. It is not being shared to impress the audience with

the brilliance of the trainer. It is not an exercise in egomania or "see-me"...it is geared to and for the learners in the most direct and helpful way possible.

Roles of the Trainer

The role of the trainer is a constant juggling act. Like a juggler, trainers must keep several dimensions in mind at the same time:

1. What they are saying presently.
2. How to bridge from what is being said to what is to be said next.
3. Making the bridges smooth, easy and logical.
4. What the main point is for each piece of the information puzzle.
5. How the audience is receiving the message so that they can move on if it has been understood or restated if most of the audience is looking skeptical or puzzled.
6. Which technique might be best for what is being said now and what can be used for what is coming up so that there is a mix of techniques.
7. Constant integration of the trainer's understanding of the variety of adult learner's styles: auditory, visual or hands-on.
8. Timeframes for breaks, segments, etc. You must know where you are at all times.
9. Room comfort, temperature, setting, etc.

It was once said that Einstein was a genius because he could think on seven different levels at once, so you can see what a challenge it is for a trainer...they must think at nine levels simultaneously! Whew.

Competencies

According to the American Society of Training and Development (ASTD), there are fifteen competencies good trainers must have:

1. Needs Analyst: defines gaps between ideal and actual performance and specifies the causes of the gaps.

2. Task Analyst: Identifies activities, tasks, sub-tasks, human resource and support requirements needed to accomplish specific results in a job or organization.

3. Program Designer: Prepares objectives, defines content, selects, and sequences activities for a specific program.

4. Instructional Writer: Prepares written learning and instructional materials.

5. Media Specialist: Uses audio, visual, computer and other hardware-based technologies for training, education and development.

6. Program Administrator: Ensures that the facilities, equipment, materials, participants and other components of a learning program are present and that program logistics run smoothly.

7. Instructor: Presents information and directs structured learning experiences so that individuals learn.

8. Group Facilitator: Manages group discussions and group processes so that individuals learn and group members feel the experience is positive.

9. Evaluator: Identifies the extent of a program, service or product's impact.

10. Transfer Agent: Helps individuals apply learning after the learning experience.

11. Marketer: Sells training, education and development viewpoints, learning packages, programs and services to target audiences outside the marketer's work unit. (In-house trainers also have to do this INSIDE their own organization.)

12. Theoretician: Develops and test theories of learning, training, education and development.

13. Individual Development Counselor: Helps an individual assess personal competencies, values and goals; also helps to identify and plan development and career actions.

14. Manager of Training & Development: Plans, organizes, staffs, controls training, education and development operations or projects; links training and development with other organizational units.

15. Develops long-range plans for what the training and development structure, organization, direction, policies, programs, services and practices will be in order to accomplish the training and development mission.

Some of the ASTD's list will not be appropriate to your efforts precisely, but at one time or the other you will probably work within a variation of these roles as you plan for and train others.

Attitude

Beyond the understanding of a trainer's various roles, the many levels on which they must think, and what competencies they must have, there is one more critical aspect to effective training. It is subtle, hard to calculate, difficult to teach and impossible to mandate: It is the Attitude of the trainer.

Please understand a primary appreciation you as trainer must have as you step to the podium: Adult audiences are SMART.

They have been around longer than children, who are mandated to attend class and have no choice but to accept the teacher and what she or he has to say. Not so with adults! They have a lot of experience plus the courage of their convictions, so heaven help you if you assume that you can slide by with poorly prepared or invalid information. They will stand you up straight and challenge you till you fall over!

Never adopt an "I know more than YOU!" attitude...first of all, you probably don't and even if you do, arrogance is not the best way to establish a good rapport.

Pay particular attention to the essence of the content. Understand that you are trying to establish a relationship between yourself as trainer and the learners in front of you. If you have content to present to which the audience is resistant, you will have a more difficult time in getting it across. To help you do this, you will need to adopt an "I-understand-this-is-difficult" attitude that is genuinely sensitive to the adjustment needs of the learners. Being told that they must change their pattern of work, for example, can put some people into shock, and we have to recognize a need for a period of adjustment. "Do it because I say so!" won't help.

If the essence of the subject is acceptable but the training itself is presented poorly, the audience will challenge the trainer from the floor and voice their disapproval even more loudly as they fill out their evaluations. Never be a sloppy trainer ...an attitude of "who-cares?" translates into a belief by the audience that they have not been deemed worthy of a good effort.

One sure way to turn an audience off and run the risk of mayhem and mutiny is to be condescending, arrogant, uncaring or in any other way negative. In such cases, participants will usually "attack" the trainer in any way possible. (I'll admit to another bias: I think they deserve it!)

The attitude of good trainers is one of caring, listening, respect and integration of the audience. Beyond the words or handouts or overheads or exercises that the trainer employs, it is the connector between teacher and students that makes the information transfer positive and possible.

Having said all that, however, I must caution you that rarely does a trainer please everyone all the time. There are instances where the trainee brings unrealistic expectations to a training and is therefore disappointed when they are not met.
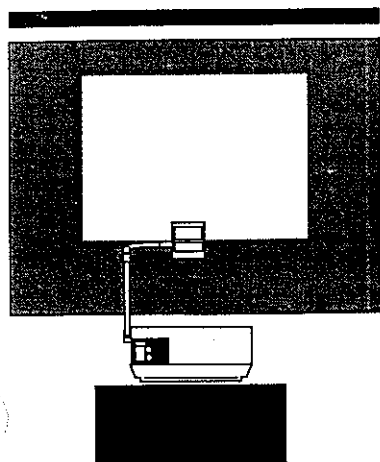
I discovered that I needed to ask for combat pay whenever I was training recruitment or fund raising....inevitably there was someone who voiced their unhappiness that I had not presented a magic bullet idea that would recruit all the volunteers they needed or raise all the funds they required.

They will sometimes (rarely, I hope) come to your training with the goal of DIScounting whatever you might say. They do so because they don't want to learn what you are presenting because if they learn it they would have to DO it. Remember what Abraham Maslow teaches us: "Refusal to learn is more deeply a refusal to DO."

Last but not least, you may have someone in your training audience who comes with a hidden agenda that would make anything you had to say unacceptable to them. Sometimes these folks become openly disruptive, and although you may not know the exact bone they have to pick with you, you realize that their mission is to fluster or derail you. The trick of course is to not let them have their way.

I can recall one event when this was going on and I could not for the life of me figure out what the matter was with my "interrupter." Only later did I find out that she was also a trainer who had campaigned to do the training I was hired for.....her agenda?: see that I was not hired again. I was, but only with nightmare memories of my last interaction with that agency.

How to Spot a Good Trainer

I think I can instinctively tell whether a person can be a good trainer or not. In leading training-of-trainer sessions, I looked for specific qualities people brought to their training, whether or not they were smooth in their beginning presentations or not.

First of all, were they honest? Did they project a validity and congruence that the audience could see and feel? No hype, no hoops and loops, no laser lights or bells and whistles...just open, "here-I-am" and here's-what-I-want-to-share" presentations.

I think that is why I believe in having trainers who have actually DONE what they are training so they can draw on their own, first-hand experiences. I never took a training job in anything I had not actually done in leading my volunteer program for Project Concern. I always felt, "who was I to tell others to do something I had never had to do?" I think it stood me well as it will you.

Personal integrity is critical also, and must come across to an audience. Trainees need to trust the trainer so that they can, in turn, trust the information. Sharing war stories, experiences and even failures can help attendees sense a level of personal integrity that helps them accept the training.

Nothing is more important to you than your good reputation. Guard it passionately!

Good trainers keep current. Have you ever gone to a session led by someone you heard ten years before and realize they are reading the same speech? Yuck. That is probably why I don't believe in scripts for training...to keep information fresh and dynamic I think you jot down key points that remain the same over time, but fill in around them with the most current examples and stories possible.

Good trainers avoid assumptions, about the audience, what

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they need and what might be best for them. Make sure you keep up to date with the changing faces of your audiences. Talk with others in your field, read the latest information and stay on the cutting edge. Don't just re-cycle old training, revitalize it.

Avoid power struggles. If you hear incorrect information being given out about you, state the correct information and avoid blaming the person who shared the information. Understand that some people may be passing on information without realizing it is not accurate (MIS-information) while sadly, others may on occasion be spreading information they know to be untrue (DIS-information).

The latter is the hardest to deal with and the most apt to lure you into retaliation. Please don't...no one wins that joust. Simply clarify what you can, avoid any attacks on the source and let the quality of your training speak for you.

Good trainers care about their audience and it shows. Find out needs and wants from your audience before you begin your training. Care about these needs and about each trainee as an individual. Be patient and work with them until what you are saying makes sense to them and they can find a way to use it.

Good trainers also understand that their job is to impart information. The goal is not to be loved, so don't think that the reason you are supposed to care about the audience is so that they will care back. Sometimes you will have to tell them tough stuff, and you won't be able to do that effectively if the only thing on your mind is "will I be loved if I say this?" Avoid having attention shifted from the learning to you as trainer...idol worship is not healthy for anyone and leads to eventual "clay feet" reality.

Respect the intelligence and dedication of the audience. They have difficult jobs and a personal life that might be offering stress rather than solace. If you must assume, assume the positive about every person sitting before you!

Be open with your audiences. If you don't know the answer to a question, say so and see if someone else in the audience does. Tell stories on yourself...letting the audience learn from your mistakes can often be a great tool of training!

Last but not least, great trainers are PASSIONATE about what they are teaching. They believe in their "product"....they believe that the audi-

THE GREAT TRAINER'S GUIDE

HOW TO TRAIN ANYONE TO DO ANYTHING!

SUE VINEYARD
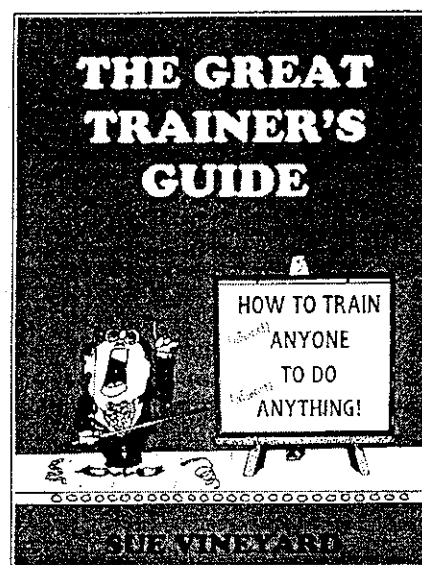
ence will be better off and more effective if they can get their message across.

I have taught numerous audiences about how they might best take care of themselves as they work so hard to take care of others. I'm the most passionate when I train in this area and I'm told it shows. I'm also passionate in my belief that volunteer program managers are the miracle workers that will lead the way to better living for millions. I find words inadequate to express how deeply I feel about this, and again, I'm told it shows. Good.

Conclusion

There are thousands of rules, tips and guidance available to you as to how to plan, implement, present and evaluate trainings. To me, however, the most important thing is the trainer...in her wisdom, sensitivity, depth of knowledge, respect of the audience and belief in the topic.

Training will, I believe, become a greater and greater aspect of the volunteer manager's job in our new century. Transferring knowledge successfully into the minds of the people who must turn in into effective actions is a daunting challenge, but it can be done....with care and passion.

I wish you well.

Sue Vineyard is the author of "The Great Trainer's Guide: How to Train (almost) Anyone to do (almost) Anything! c. 1995 rev. Heritage Arts Publishing, 1807 Prairie Ave. Downers Grove, IL 60515. $20. (see order form in this issue of Grapevine).

Sue Vineyard

A Trusty 10-Step Planning Model

Excerpted from *The Instructor's Survival Kit: A Handbook for Teachers of Adults* by Peter Franz Renner, 1978

How to Use:
- Add or delete parts that suit you
- Don't go to far in planning (and don't start to instruct) unless you first have a clear picture of your objectives. What are you aiming for?
- No one method is best for all groups. Beware of your pet methods and weak spots and try to avoid them.
- Aim to be leass a sold provider of knowledge and more a helper in the adult's learning efforts. This way you will be able to attend to their varying needs, demands and talents
- Remember, it is your plan and you can change it. Try to learn from the decisions you make as the changes occur.
- Don't use the model in linear fashion. Start anywhere, go clockwise and counter clockwise; just try to cover all points at some time.

Select evaluation techniques. How

Evaluate resources. What peo
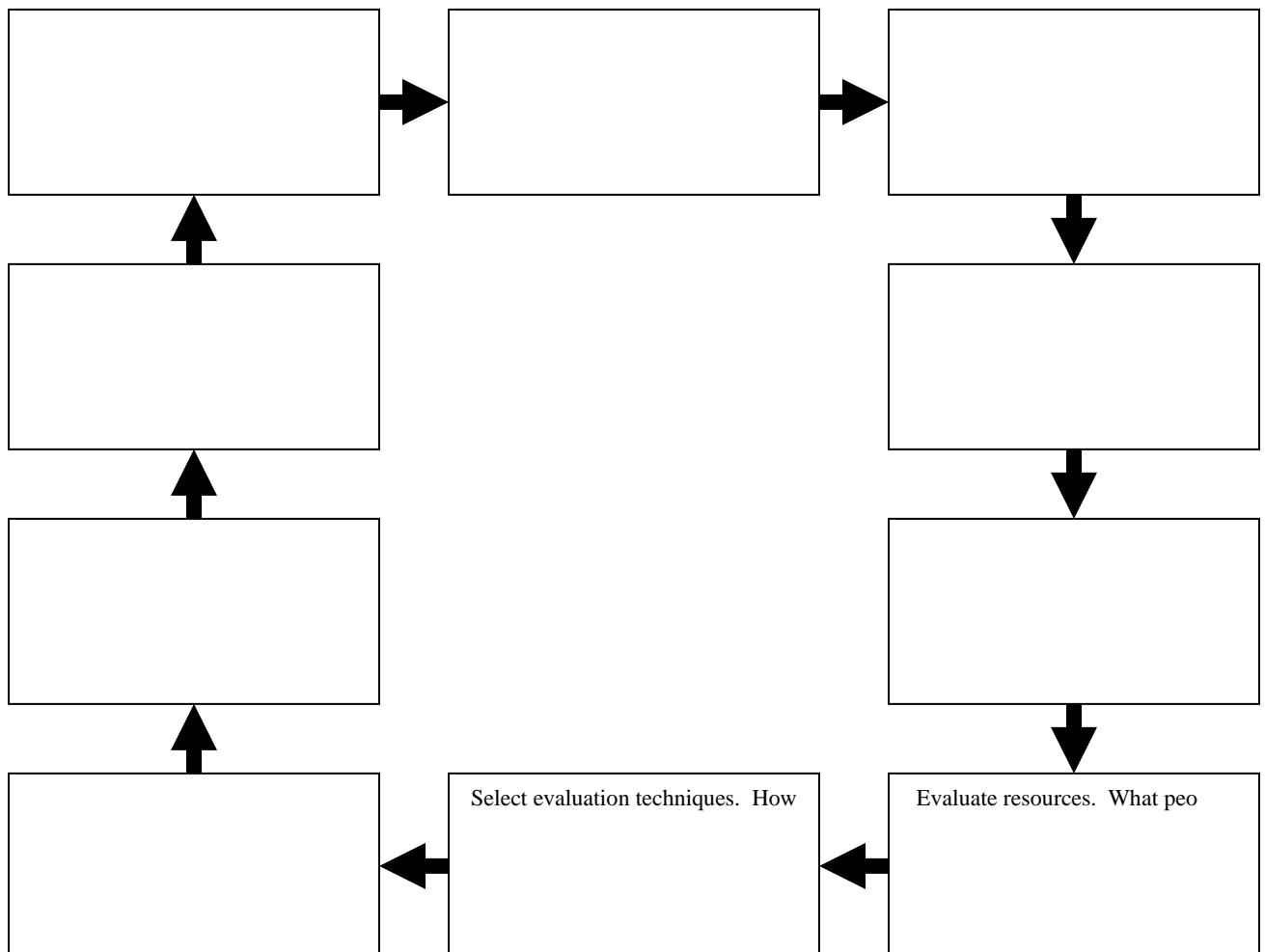
Step 1: Assess Your Own Skills

As the trainer you are the center of the training plan. Your personality, your attitude, your communication skills, your knowledge and experience as the "expert" and teacher are all essential contributions to the plan. By taking an inventory of what you are bringing to the course, you can pin-point strengths and weaknesses. Ask: How can I use my strengths? How can I best share my experience with the learners? How can I share the load? Which areas give me trouble in this course? Who (what can) help? What happened during the last course? What went well and what needs work?

Step 2: Assess the Learners' Skills

Ask: How can I get a clearer picture of my prospective students? Can colleagues help? When I taught the course before, who attended? What type of person is likely to respond to the calendar course announcement? What will she expect , bring with her, hope to gain, be prepared to share?

Step 3: Assess the System

The agency, company or school which sponsors the course often influences who comes. What is expected, Is this a relaxed, formal, old-fashioned, liberal, academic, or happy type of place? What are the rules that will affect your course? What are the administrative constraints? With points 1, 2, and 3 sketched out, you now have a fairly good idea of the people that will be involved and also know of some of the dynamics that will govern your course.

Step 4: Your Instructional Objectives

The following simple rules for defining the objectives will help you plan:

- *Decide what you expect the students to be able to do, know, think and feel by the end of the course.* Avoid vague statements, be specific about the skills, degree of knowledge, attitudes and feelings.
- *Be specific with the words you use.* Use action verbs. Rather than words like "appreciating" or "understanding" or "having an overview", use action words like "appreciate, understand, compare, describe, utilize… etc.
- *Communicate your objectives to others.* Sharing your objectives with your learners can achieve the following benefits:
    1. Potential learners can make more informed course selections.
    2. Learners know what to expect and what is expected of them
    3. Learners may be able to chose certain objectives that suit their needs
    4. Outsiders can assess the course more readily by looking over the list of objectives.
- *Divide objectives according to types of learning.* When you identify the type of learning objective, you can then match it with an appropriate learning method. (See Mary Lubertozzi's "Table 1: Matching Learning Methods to Learning Ojectives")

Step 5: Select Teaching/Learning Strategies
Teach someone to swim by the lecture method will yield little real learning. A combination of demonstrations, brief lectures, and plenty of practice would be more suitable for this type of learning goal. Yet how many times do instructors lecture for hours on a subject that requires activity, practice, discussion, exploration, questioning, or some other strategy? Certain strategies are more suitable for certain learning objectives.

Step 6: What Resources
Going through the steps so far may already of brought to mind films, materials, handouts, outside speakers, tools or some other resources that you know of, or hope to be able to locate. Make a list and plan ahead.

Step 7: How Will You Know That Learning is Taking Place?
You and your learners must assess your progress towards the final product. Often a well-written objective provides clues and a basis for evaluation.

Step 8: Make a Tentative Schedule
This step comes in two parts. First, you could sketch out the way you might use the time allotted for the training. Second, you could make a more detailed outline for each session.

Step 9: Do It
There is a certain element of sink-or-swim to this step. While careful planning does not guarantee you stay above water all the time, it certainly gives you the confidence to come up for air at frequent intervals, see where you are going, enjoy the sights abit, and feel good (if exhausted) when you reach solid ground again at the end.

Step 10: Evaluate
This can be the most important (and exciting_ part of the entire process' you can obtain information that either support what you have been doing or offers opportunity for change and further development. You can start off with an evaluation, do check-in evaluations during the training and finish with an evaluation.

Planning a Training

Use this "thinking" sheet to strategically plan your meeting, training, or learning session. Then use the worksheet on the next page to develop a detailed "facilitator's agenda."

DESIRED OUTCOMES:

Par

OPENING:

From the evaluations, were the outcomes met?

LEADING: How will you

CLOSI

From the training session "Beyond Icebreakers and Power Points - Incorporating Principles of Adult Learning into your Training Program" presented by Nancy Henry, Judith Gold, and Nicole Trimble at the National Conference on Service and Volunteerism (June 20, 2006).

TRAINING DEVELOPMENT WORKSHEET

Facilitator's AGENDA -- TOPIC: _____

Desired Outcomes:

 - ●

Time	What	How	What Appeals To?	Materials
	Opening		Visual Auditory Kinesthetic	
	Leading		Visual Auditory Kinesthetic	
	Closing		Visual Auditory Kinesthetic	

From the training session "Beyond Icebreakers and Power Points - Incorporating Principles of Adult Learning into your Training Program" presented by Nancy Henry, Judith Gold, and Nicole Trimble at the National Conference on Service and Volunteerism (June 20, 2006).

Volunteer Training Plan Worksheet

1. Volunteer position to which this training plan applies:

2. Person completing this planning worksheet **and date:**

3. Knowledge, skills, and attitudes (KSAs) that volunteer(s) in this position need and whether organization will recruit volunteers with it, train for it, or both.

	Recruit	Train
Knowledge		
Skills		
Attitude		

4. Training Design

On the previous page, you identified KSAs for which the organization would provide training.   For each KSA, write an objective and design a learning activity that will help volunteers develop that knowledge, skill or attitude.

1	**Objective (KSAs)**	**Format:**
		☐ activity ☐ game ☐ worksheet ☐ brainstorm
	Learning Activity	☐ project ☐ lecture ☐ poll ☐ role play ☐ other:
	Description	
	Materials	

2	**Objective (KSAs)**	**Format:**
		☐ activity ☐ game ☐ worksheet ☐ brainstorm
	Learning Activity	☐ project ☐ lecture ☐ poll ☐ role play ☐ other:
	Description	
	Materials	

3	**Objective (KSAs)**	**Format:**
		☐ activity ☐ game ☐ worksheet ☐ brainstorm
	Learning Activity	☐ project ☐ lecture ☐ poll ☐ role play ☐ other:
	Description	
	Materials	

Learning Activity	
Description	
Materials	

Objective (KSAs)	**Format:**
Learning Activity	☐ activity ☐ game ☐ worksheet ☐ brainstorm ☐ project ☐ lecture ☐ poll ☐ role play ☐ other:
Description	
Materials	

Objective (KSAs)	**Format:**
Learning Activity	☐ activity ☐ game ☐ worksheet ☐ brainstorm ☐ project ☐ lecture ☐ poll ☐ role play ☐ other:
Description	
Materials	

5. Training Delivery

When to deliver?	**Where** to deliver?	**Who** will deliver?	**How** will deliver?

6. Training Evaluation

How will training be evaluated?

HELP!
I Have to Plan a Training Program
Mary Lubertozzi

Matching Learning Methods to Learning Objectives

Type of Objective	Appropriate Learning Methods
Knowledge/ Information	- Reading - Field Trips - Lecture - Interview - Symposium - Panel Discussion - Films and slide presentations
Applying Information	- Problem-solving discussion groups - Buzz groups - Brainstorming - Case discussion - Reading with small group discussion - Field trips
Skills	- Role playing - Skill practice exercises - Demonstrations - Case study and discussion - Video taping and playback - Individual or group projects
Attitudes	- Warm-up exercises - Introductions - Setting expectations - Games - Physical exercise (breathing) - Matching pairs of cards - Discussion of their own experience - Role playing - Case study - Dramatization (skits. Etc)

Mary Lubertozzi - Area IV Manager of the Association of Junior League, managing a field office which services Junior Leagues in twelve states and two provinces in Canada. A graduate of Loyola University, she earned an MA degree in Instruction and Training from Governors State University

How Adults Learn

Training Method	Average Rate of Retention
Lecture	5%
Reading	10%
Audiovisual	20%
Demonstration	30%
Discussion Group	50%
Practice by Doing	75%
Teach Others (immediate use of learning)	90%

I hear and I forget
I see and I remember
I do and I understand

Confucius

Training Tips:

Characteristics of Adult Learners

- Adults regard growth in self-understanding equally as important as growth in learning.

- Learning new material is facilitated when it is related to what is already known. Techniques used should help the adult establish this relationship and integration of material.

- The existence of periodic plateaus in the rate of learning necessities frequent changes in the nature of the learning task to insure continuous progress. Therefore, techniques should be changed frequently in any given session.

- Adults learn best in a cooperative environment that encourages risk-taking and experimentation.

- Learning is goal-directed and adults are trying to achieve a goal or satisfy a need. Therefore, the clearer, the more realistic and relevant the statement of desired outcomes, the more learning that will take place.

- Learning that is applied immediately is retained longer and is more subject to immediate use than that which is not. Therefore, techniques must be employed that encourage the immediate application of any material in a practical way.

- Adults have a vast store of knowledge and experience from which to draw and apply to the current learning situation.

- Learning is an active process and adults prefer to participate actively. Therefore, those techniques that make provision for active participation will achieve more learning faster than those that do not.

- Learning must be reinforced. Therefore, techniques must be used that insure prompt, reinforcing feedback.

- Learning is facilitated when the learner is aware of his progress. Therefore, techniques should be used that provide opportunities for self-appraisal.

- Learning is facilitated when there is a logic to the subject matter and the logic makes sense in relation to the learner's repertoire of experience.. Therefore, learning must be organized for sequence and cumulative effects.

- Adults generally learn best in task or experience-oriented learning situations.

- Adults need to be respected in the training environment for choosing to participate.

- Group learning insofar as it creates a "learning atmosphere" of mutual support, may be more effective than individual learning. Therefore, those techniques based on group participation are often more effective than those which handle individuals as isolated units.

- Adults learn best when they have some control over their own learning experience.

- Adults are sensitive to failure in the training situation.

Multiple Intelligences

Verbal/Linguistic

word search
terms defined
fill-in-the-blanks
writing assignments
telling stories
reading assignments
speaking
oxymorons
humor/jokes
interviews
poems/reading

Logical/Math

hypothesis/test
sequential outline
syllogisms/reasoning
symbols and codes
strategy games
problems to solve
logical analysis
classify and categorize
create collections
cause and effect

Kinesthetic/Body

skill practice
hands on/touch
pantomime
creative drama
act out
simulations
dance
puzzles
concrete examples
smells
textures

Interpersonal

multi-cultural
cooperative games
collaborative projects
discussion and feedback
peer review
group problems
synergy activities
team building
group presentations
social skills
conflict management
group discussions
mentor/tutor

Intrapersonal

guided fantasy
silent reflection
individual tasks
explore self choices
metacognition
self evaluation
values
emotions inventory
personal focus
perceptions
interest surveys
meaning/relevance
individual action plan

Musical

background music
theme music
rhythmic
tones
make sounds
play instrument
music associations
theme songs
environmental context
sounds
raps
sounds like?

Spatial

color/paint
pictures/images
mind mapping
films/video
slides
maps/flowcharts
peripheral images
draw images
relationship sculpture
clay models
3-D materials
highlighting

Naturalist

outdoors
flora
fauna
water
nurturing
growing
organic
universal
essential

Learning Styles

United Way of King County

Visual Learners

Learn Through S	Session Clues	Training Strategies
• Instructor's body language and facial expressions • Visual displays of information • Think in pictures or images	Visual learners tend to • Sit in the front • Take detailed notes • Respond to visual displays rather than written text	• Display information using graphics, diagrams, and other visual images such as content maps • Use newsprint pads, posters, overhead transparencies, or PowerPoint slides • Provide handouts that include visual information along with critical text

Life Clues: Visual learners are:
- Often deeply affected by colors and shapes
- Will recount colors and shapes more extensively
- Are sensitive to the order or chaos of the objects in a room or things surrounding them; are excited by sunsets and scenery
- Seldom get lost; once in a locale, will remember the area and find their way back
- Collect internal photos and can usually recall the photos quickly and really know how to search through their memory files
- Enjoy going to art galleries, watching TV or movies, taking scenic trips, and taking photographs

Auditory Learners

Learn Through L	Clues	Training Strategies
• Verbal lectures and discussions • Talking things through • Respond to tone of voice, pitch, speed, and other nuances of speech	Auditory learners tend to • Engage in discussions readily • Respond to written material only after it is heard • Be sensitive to noise that is scratchy, high-pitched or persistent	• Verbal presentation of information • Interactive discussions • Role plays • Use of music • Paired and small group discussion

Life Clues: Auditory learners will

- Usually have the latest in audio/sound equipment and have sophisticated speakers or headphones so they can get the right stereo balance
- be more offended than others by scratchy, high-pitched or persistent noises
- Have voices with a nice, pleasing, melodious rhythm
- Have music as a big part of their lives, often enjoy music in the background, and enjoy attending concerts, operas, and symphonies.

Tactile/Kinesthetic Learners

Learn Through Moving, Doing, T	Session Clues	Training Strategies
• Hands-on learning opportunities • Activities that involve movement	Kinesthetic learners tend to • Have an acute sense of touch • Notice the temperature of a room and be sensitive to both hot and cold • Become distracted if sitting for a long period of time	• Completing worksheets, posters • Drawing, painting, or building representations of information • Use rotating activities, such as carousels and gallery walks

Life Clues: Kinesthetic learners usually

- Are ruled by how they feel about everything
- Have an acute sense of touch
- Are the first to hug or shake hands, sometimes holding onto the other person for a longer period of time
- Surround themselves with tactile objects
- Have a highly attuned sense of intuition
- Enjoy painting, shopping for new clothes and home décor
- Are adept at home decoration and crafts, including arranging flowers
- Are drawn to inspirational writings, movies, and music

Learning Styles Identification Checklist

An Auditory Learner learns through verbal instructions from others or self
- □ Talks a lot
- □ Is a good storyteller. Tells jokes
- □ Is good at talking on the telephone
- □ May talk to him/herself when working alone. Talks self through problem
- □ Gives verbal excuses for not getting things done
- □ Asks questions about written directions
- □ Easily distracted by sounds
- □ Will hum or talk to self or others when faced with periods of inactivity
- □ Emotions are expressed verbally and through changes in tone, volume, pitch of voice; may shout with joy or anger

___ Total Auditory

A Visual Learner learns by seeing; watching demonstrations
- □ Is tidy, Does not like clutter
- □ Is distracted by visual disorder or movement.
- □ Notices details. Finds items others lose
- □ Likes to work puzzles
- □ Will ask you to write directions down.
- □ Will stare or doodle when faced with periods of inactivity
- □ Becomes impatient when extensive listening is required
- □ Remembers faces, forgets names; takes notes
- □ Emotions are best indicated by expression

___ Total Visual

A Kinesthetic Learner learns by doing; direct involvement

- □ Likes to touch things. Likes to take things apart and put them back together again
- □ Enjoys to sports. Is well coordinated.
- □ Uses hands to talk
- □ Likes to draw and doodle
- □ Remembers best what was done- not what was seen or talked about
- □ Attacks problems physically. Impulsive; often selects solution involving greatest activity
- □ Will fidget when faced with periods of activity
- □ Talks in verbs which indicate action, i.e., "I ran into Tom yesterday"
- □ Emotions are expressed by general body tone- will jump for joy, etc.

___ Total Kinesthetic

THE VOLUNTEER CENTER

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Supervision and Evaluation

TABLE OF CONTENTS

Effective Volunteer Supervision Strategies

United Way of King County

(Presented by Andy King at the 2004 *Faith in Action* National Conference
Andy King is the director of training and consulting at Points of Light Foundation)

A recent study of *Faith in Action* programs showed that effective volunteer supervision is one of four key factors that lead to volunteer retention. Following are strategies for supervising volunteers, whether in your facility or off-site, and ways of providing supervision for every volunteer without having to do it all yourself. The objective is to treat volunteers in a way that brings out their best.

STEPS TO SUPERVISING VOLUNTEERS

Step 1: Define and Communicate Clear Expectations

Lack of clarity undermines even the best work or the best volunteers. There are two principal areas in which volunteers need clear expectations, listed below.

Volunteers need and deserve clarity on...	Materials that can help provide clarity	Methods for communicating these expectations
1. Significant agency policies, procedures and operations that affect them or that they affect (e.g. client confidentiality, procedures for closing the building, etc.).	Written policies and procedures. Agency values statement Contracts	Volunteer orientation / training Video Web-site video
2. Their responsibilities and functions toward the agency and its clients (e.g. when expected to volunteer, what expected to do, how, etc.).	Volunteer Position Description Posters with expectations of different jobs	Volunteer orientation / training Video Web-site video Job shadowing
3. The agency's responsibilities toward them (e.g., training, transportation, meals, amount of supervision, etc.)	Contracts Volunteer Position Description Posters with expectations of different jobs	Volunteer orientation / training Video Web-site video Job shadowing

Step 2: Guide and Support Volunteers

Guiding volunteers consists of giving volunteers the

Instructions
Direction
Feedback   }   needed to perform their functions well.
Corrections
Information

Exercise: Comparing various ways to guide volunteers

1 "Our mission is to provide nutritional support to needy families in the community. We expect 50 people to come for our services today. Your assignment is prepare nutritious meals that will feed all of them, that will make them happy (so they'll come back) while staying within our budget. I'll leave you in charge of making sure that happens. Good luck. Let me know what, if anything, you need, and if you have any questions or problems."	2 "The task for today is to make 100 peanut butter and jelly sandwiches and have them ready by noon. Good luck and let me know if you have any questions or problems."
3 "What I'd like you to do is to place two knives, a loaf of bread, a jar of peanut butter, a jar of jelly and a box of sandwich bags here on the counter. Then do the same in four more spots along the counter. When you have completed this step, come back to me and I will give you the next step."	4 "Here's what we need you to do today. Set up 5 stations along the counter for 5 volunteers, each with 2 knives, a jar of peanut butter, a jar of jelly, a loaf of bread and a box of sandwich bags. At each station: Spread approximately 2 tablespoons of peanut butter on one slice of bread using one of the knives. Using the other knife, spread about a tablespoon of jelly on top of the peanut butter. Place another slice of bread on top of the jelly. Place the sandwich in a sandwich bag, fold over the flap and tuck it in. Continue until there are a total of 100 sandwiches. Let me know if you have any questions or problems."

Step 3: Ensure Volunteers Feel Rewarded and Recognized

This step is about setting the environment, structuring the experience, treating volunteers and recognizing volunteers so that their volunteer work is personally rewarding to them. Ensuring volunteers feel rewarded involves decisions around the entire volunteer experience, not just on plaques and thank you cards (although they are important too).

What are some strategies you have used to ensure that volunteers feel rewarded and recognized?

Supervising Off-Site Volunteers

There are three main issues to consider when supervising off-site volunteers.

- **Creating a Bond**: Volunteers work better when they feel closely connected to the program and identify with other volunteers and staff.
- **Maintaining Communications**: Establishing regular communication channels helps prevent off-site volunteers form drifting away from the program.
- **Establishing Supervisory Control**: Finding ways to provide direction and support to off-site volunteers can be a challenge, but they need is as much as any other volunteer.

Volunteer Supervision Models

Effective volunteer organizations have a clear focal point of responsibility for the volunteer program, but the volunteer management function is well-integrated at all levels and in all parts of the organization.

Below are some categories of individuals who can be responsible for managing groups of volunteers. What are some of the considerations to keep in mind when engaging each in the role of volunteer supervisor?

Role	Considerations
Staff	
Volunteer Coordinator	
Congregational Coordinators	
Interns and other service program participants	
Volunteers (as supervisors)	

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Principles of Supervision

1. People must always understand clearly what is expected of them.
   a. What does the organization stand for; how does it work.
   b. What is the volunteer's specific job.
   c. How will the quantity and quality of work be evaluated.
   d. What will the training program be.
   e. What are the career opportunities.

2. Coaching
   a. Provide information.
   b. Techniques to do the job better.
   c. Personality improvement.

3. Good work should be recognized.

4. Poor work deserves constructive criticism.

5. People should have the opportunity to grow.

6. People should work in a safe and healthful environment.

The Art and Science of Supervision

A GOOD SUPERVISOR SHOULD:

1. Know that leading is hard work
2. Be interested in people
3. Have patience
4. Have sympathy and tolerance
5. Be loyal
6. Be accepting of constructive criticism
7. Be tactful
8. Be objective and impartial
9. Be dependable
10. Be cooperative
11. Be democratic
12. Keep a good sense of humor
13. Be enthusiastic
14. Use imagination
15. Apply common sense
16. Have integrity

From: Volunteer Recruiting & Retention: A Marketing Approach, by Nancy Macduff, 1985

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While the prospect may seem daunting to some, it really *is* possible – and important – to conduct individual evaluations on how well volunteers are doing in their assignments. In fact, I feel it's a form of *recognition*. It implies that the work is of such significance that it matters if it's done right, and it assumes that each volunteer is equally committed to best performance.

Note, however, that without a written volunteer position description (which the volunteer agreed to do at the beginning of service), there is no basis upon which to determine if a volunteer was successful or not in fulfilling an assignment. So you have to start with current, relevant position descriptions.

Here are a few ideas for making the assessment process successful:

- Apply the process to all volunteers fairly and equitably. Tell all new volunteers that assessment is a routine part of the work because everyone wants to provide the best services.
- Call the process something other than an "evaluation," which conjures up memories of student report cards (or pay raise conferences) and emphasizes the past. Instead, use more neutral phrases such as: "Mutual Assessment," "Progress Plan," or the "Where Are We?" form.
- Be sure that the process is *two-way*. This is a great time to learn about your organization from the volunteer's perspective. (Remember how we keep saying that volunteers bring us a fresh point of view?)
- Start with the volunteer position description. What was actually accomplished? What was not and why? How should the position description be changed to accommodate changes in the work since it was written? What did the volunteer do (positive or negative) that was not in the original position description?
- Believe in the philosophy that no one wants to volunteer time uselessly. Any feedback and help you give to a volunteer who is not doing the job right will help him or her to do better...and therefore to give time more productively. If you do not point out errors, you allow the volunteer to waste time.
- Performance evaluations often indicate training needs for volunteers. Are you ready to respond? What happens if the process shows the need for further training of paid staff?
- Look ahead, not back. This is an opportunity for re-commitment and is best approached as a form of recognition. Celebrate accomplishments! But be ready, too, to deal directly with possible problems.

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CONFRONTING A VOLUNTEER PRODUCTIVELY

When you have a problem with a volunteer, you should follow this ten-step procedure for arriving at a productive solution:

Step 1: Set a time and place to talk, "I want to discuss with you an issue that concerns both of us. When and where would be a good place to do this?" (Agree on a time and place. Be sure to provide enough time and insure complete privacy)

Step 2: (When you have arrived at the appropriate spot), state your intentions and expectations for the outcome of this meeting. "I want to discuss an issue about a certain way we are working together. I hope we can join together to create a solution that will be agreeable to you as well as to me."

Step3:

Step4: State the even – "Remember when…" (wait for acknowledgement).

State your feelings about the event using "I statements" and end your statement with a questions – "When this happened…I felt…I felt that way because I wanted…How are you feeling?"

Step5:

Explore all relevant information concerning the event – "I'd like to to tell you my view of what happened and I want to year your side also." DON NOT GO FOR SOLUTIONS YET.

Step6:

Repeat the volunteer's view of the event – "OK, let me see if I understand your statements. What you're saying is…"

Step 7: Explore solutions that would satisfy both of you – "Maybe now that I understand what you were thinking about and you understand what I was thinking about, we can explore some ways to solve this kind of problem in the future."

    a.   What can I do to be helpful to you in such a situation?
    b.   Here's what you can do to help me.

Step 8: Offer a fair-exchange – "OK, I'll perform this service for you in the future, if you perform this service for me in exchange"

Step 9: Test for agreement and commitment – "is it realistic to think we can carry out this agreement? What will we do if one of us finds it impossible to keep our half of the agreement?

Step 10: Sum up – I think we have agreed that…

Volunteer Self-Assessment Form
Sample

1. Do you feel you are reaching the expectations listed in your position description (goal setting, etc.)?

   If not, share your reasons for the gap.

2. Was the estimated time to accomplish your volunteer work realistic? Comment:

3. Did the organization/supervisor provide adequate orientation, training, supervision and resources for you to accomplish your position? Comment and offer suggestions for improvement:

4. What have been your greatest satisfactions in your work here?

5. What have been your greatest disappointments in your work here?

6. Were other volunteers and paid staff receptive and appreciative of your volunteer work?

   Comment:

7. What were your areas of growth in your volunteer position?

8. Overall I would rank my performance as:

   __Superior, exceeding expectations

   __Excellent, met expectations

   __Needing improvement, did not meet expectations

9. Comments to explain above answer:

10. What type of assignment, skill development, and time commitment do you desire for next year or the time period under discussion (same position, new challenges, departure)?

11. Other comments, suggestions, etc.

Eight Myths About Difficult Volunteers

By Sue Vineyard
From *New Competencies for Volunteer Administrators*

United Way of King County

Let's look at some myths in regard to these very troublesome volunteers. If you find yourself believing one of the following, you may have to readjust your thinking as you plan your strategy in dealing with identified problems.

The MYTH statements that confound problems & make them worse

1. Ignoring a problem will make it go away.

WRONG. It may go underground and be more difficult to confront, but it will not go away, unless, of course, you plan to simply wait for the person to die, the height of avoidance.

2. No one else notices. I'm the only one who is suffering.

WRONG: You must be kidding. Others see the problem and can shift their anger or frustration to you, wondering why you don't take control and stop the negative behavior.

3. I can fix/change the problem person.

WRONG. You can't and shouldn't. That's not why you're there. "Fixing" volunteers will drain your energy, time and effectiveness and ignore the 98% of volunteers who are doing a great job. Keep in mind, I am not talking about people who are causing minor problems and simply need to be set straight m talking about real trouble-makers who are dysfunctional.

4. There's good In everyone. I just need to give them time to show it.

WRONG. There are some nasty people. How they got that way is not your problem or challenge. Savior is not in your job description. Time won't fix everyone and in the meantime you'll lose good people and possibly hurt some clients who don't deserve to put up with abuse.

5. If I confront them, it will make things worse.

Not if you do it carefully and calmly. NOT confronting problematic behavior will cause more trouble, however.

6. If I confront them they'll leave and the program will die.

If your program rides on the whim of one individual, you need to look for a new job. That is simply too much control, power and dependence for one person.

7. If I'm really the caring and all-accepting person I should be, I can handle them.

STOP IT! You are beginning to believe your own press clippings. You're a volunteer administrator, not a saint. Don't see other people's dysfunction as somehow a test of your worth. They are the problem, not you.

8. If I push them out they will be mad at me.

Maybe. Maybe not. If they become angry, so be it. You did what was best for the program and the people it serves. Sticks and stones and all of that….Others may actually be relieved to be out of a situation that was uncomfortable for them.

How to Fire A Volunteer and Live to Tell About It

Document Author: Steve McCurley
Reprinted From: Grapevine, Jan/Feb 93

One of the recurrent nightmares of any volunteer manager is encountering
consider 'firing' a volunteer. For many this prospect creates severe stress, both over the appropriateness of the action and over fear of possible legal and political consequences. Ann Cook, in a survey of Foster Grandparents Programs in 23 communities discovered that 82% of responding volunteer managers rated the decision to terminate a volunteer as being a 'difficult or very difficult issue' for them. Over 60% of the volunteer directors reported delaying dealing with the issue when they encountered it.

This article is intended to provide some guidelines on developing a system that will assist both in confronting and managing decisions to terminate a volunteer's relationship with an agency.

Getting Philosophically Ready

The initial requirement in developing a system for handling volunteer termination decisions is to decide that firing volunteers is, in general, a potentially appropriate action. Over the years this has been a difficult issue for many individual coordinators to address, probably because they are very people-oriented and appreciate the willingness to others to help in their programs. These coordinators have had particular difficulty in dealing with situations in which the decision to terminate was not due to any particular 'fault' on the part of the volunteer, but was instead due to ill health or a change in program needs. Programs in which there has been a focus on volunteering as a benefit to the volunteer (such as most of ACTION's Older American Volunteer Programs) have also had great difficulty with this issue because they classify volunteers as 'clients' of the program, and it is philosophically difficult to justify terminating a client.

An agency which contemplates firing volunteers may adopt several philosophical justifications. One is simply that the bottom line is the ability to deliver quality service to the clients of the agency and any barrier to that delivery is not allowable. This standard would apply to both paid and unpaid staff, as Jane Mallory Park points out:

"Whether the personnel in question are paid or volunteer, it is important to have policies and practices which promote accountability and the highest levels of performance possible without ignoring the reality that all individuals have idiosyncrasies and limitations as well as strengths. A double standard which does not give respect and dignity to both volunteers and paid staff is not only unnecessary but is also unhealthy for individuals and organizations."

A second philosophical approach has to do with giving meaning and value to volunteer service. By denying that there is a 'right' and a 'wrong' way to do a volunteer job, one conveys the impression that the volunteer work done is irrelevant and insignificant. An agency which does not care enough about the work done by volunteers to enforce quality communicates to other volunteers that the agency believes their own work to be meaningless.

The philosophical decision by an agency to fire volunteers is one that should be addressed prior to any incident. It should be discussed and ratified by staff and then codified as part of the overall policy statement on volunteer utilization and included as part of the agency's volunteer policies.

Looking for Alternatives to Firing

Before addressing development of a system for firing volunteers, it is important to note that the decision to terminate a volunteer should always be, in practice, a reluctant last resort.

Firing a volunteer is an admission that volunteer management as failed. It means that the interviewing system did not work, or the job design was faulty, or that training and supervision did not operate the way it should. It is as much an indictment of the agency as it is of the volunteer.

Volunteer Self-Assessment Form
Sample

1. Do you feel you are reaching the expectations listed in your position description (goal setting, etc.)?

   If not, share your reasons for the gap.

2. Was the estimated time to accomplish your volunteer work realistic? Comment:

3. Did the organization/supervisor provide adequate orientation, training, supervision and resources for you to accomplish your position? Comment and offer suggestions for improvement:

4. What have been your greatest satisfactions in your work here?

5. What have been your greatest disappointments in your work here?

6. Were other volunteers and paid staff receptive and appreciative of your volunteer work?

   Comment:

7. What were your areas of growth in your volunteer position?

8. Overall I would rank my performance as:

   __Superior, exceeding expectations

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   __Needing improvement, did not meet expectations

9. Comments to explain above answer:

10. What type of assignment, skill development, and time commitment do you desire for next year or the time period under discussion (same position, new challenges, departure)?

11. Other comments, suggestions, etc.

And it is crucial to remember that many situati
stringent methods. Before contemplating firing a volunteer, see if any of the following approaches may be more appropriate and less painful:

*

followed This is a common problem for agencies who utilize youth volunteers, some of whom automatically 'test' the rules as part of their self expression. Re-enforcement may end the problem.

* **Re-Assign.** Transfer the volunteer to a new position. You may, on the basis on a short interview, have mix-read their skills or inclinations. They may simply not be getting along with the staff or other volunteers with whom they are working. Try them in a new setting: and see what happens.

* **Re-Train.** Send them back for a second education. Some people take longer than others to learn new techniques. Some may require a different training approach, such as one-on-one mentoring rather than classroom lectures. If the problem is lack of knowledge rather than lack of motivation, then work to provide the knowledge.

* **Re-Vitalize.** If a long-time volunteer has started to malfunction, they may just need a rest. This is particularly true with volunteers who have intense jobs, such as one-time work with troubled clients. The volunteer may not realize or admit that they're burned out. Give them a sabbatical and let them re-charge. Practice 'crop rotation' and transfer them temporarily to something that is less emotionally draining.

* **Refer.** Maybe they just need a whole new outlook of life, one they can only get by volunteering in an entirely different agency. Refer them to the Volunteer Center or set up an exchange program with a sister agency. Swap your volunteers for a few months and let them learn a few new tricks.

* **Retire.** Recognize that some volunteers may simply reach a diminished capacity in which they can no longer do the work they once did and may even be a danger to themselves and to others. Give them the honor they deserve and ensure that they don't end their volunteer careers in a way they will regret. Assist them in departing with dignity before the situation becomes a tragic crisis.

All of these alternatives are both easier to implement and managerially smarter than making a decision to terminate a volunteer. They recognize that there are many reasons why a person may be behaving inappropriately and that some of these reasons have answers other than separating that person from the program. We strongly urge that you consider each of these alternatives before deciding to fire any volunteer.

Developing a System for Making Firing Decisions

If you do, however, encounter a situation in which none of the alternatives work, it is helpful to have in place a system for dealing with problems. Some agencies have been sued by terminated volunteers and many agencies have encountered political and community relations problems. The system that follows is designed to help the volunteer manager both in making and in justifying the decision to terminate a volunteer. Essentially, it has three parts:

Firing Volunteers in a Membership Group

There are some differences involved when you are dealing with volunteers who belong to a membership group. Many membership groups do not realize that they already have some policies that must be followed when it comes to ending a relationship with a volunteer. One major one has to do with the rules for who is a member and how on e retains membership. In most groups the only requirement for membership is payment of dues, which makes it impossible to discharge anyone as long as they are, in fact, paying dues on time. Another example has to do with members who serve in various offices. Usually the group's bylaws spell out the requirements for the job, but often fail to indicate what may be done in the event of non-performance of duties. This lack of clarity may leave the group in limbo until the next election. If you are encountering difficulties you may want to consider adding some of the policies on the next page to your by laws…

1. Forewarning/Notice The first stage of the system is developing clear policies and information about the prospect of firing volunteers. To actualize these, an agency needs to develop the following:

* A set of official policies regarding volunteer personnel issues. It is especially important to have policies on probation, suspension, and termination.

* A system for informing volunteers, in advance, about the policies. This would include a planned orientation system which discu

* A way of relating the policies to each volunteer job. This means having a job description for the volunteer which explains the requirements of the job for which the volunteer has been accepted, and has some measurable objectives for determining whether the work was accomplished.

2. Investigation/Determination The second part of the system involves developing a process for determining whether the volunteer has actually broken the rules. This implies having a fair investigator take the time to examine the situation and reach a determination that something has been done wrongly. This means, by the way, that one should never terminate a volunteer 'on the spot,' regardless of the infraction. 'Instant firing' doesn't allow one to determine whether there are extenuating circumstances. This is why a suspension policy is so important

Essentially, in this part of the system the volunteer coordinator needs to establish a process for reviewing the behavior of volunteers and recording problems. On an on-going basis this should be done as part of the regular evaluation process for volunteers. Those volunteers whose performance is unsatisfactory are told of their deficiency, counseled on improving their work, and then re-evaluated. Failure to conform to the quality standard over time becomes grounds for termination. In cases where the wrongful performance is not incremental, but is substantial in nature (inappropriate relations with a client or breach of confidentiality) then what is needed is some 'proof' that the volunteer did in fact commit the wrong-doing. This might be testimony of other volunteers, staff, or the client.

During this part of the process the volunteer manager also investigates whether any of the alternatives to firing would be a more appropriate solution.

3. Application This final part of the system requires that the volunteer manager do a fair job of enforcing the system. It requires equal and fair application of the rules (no playing favorites), appropriate penalties (graduated to the severity of the offense) and, if possible, a review process, so that the decision does not look like a personal one.

You will note that the above three processes mirror the common personnel practices for paid staff. They are, in fact the same, and they should be, since evaluating either paid or unpaid staff should follow the same rules.

The advantages of this system are two-fold. First, they assist the volunteer manager in making the right decision, and in feeling comfortable about making that decision. The system is fair to both the volunteer and the agency if properly followed and tends to produce 'correct' answers. It also allows the volunteer manager to divert to a less drastic solution as appropriate.

Second, the system helps develop a case for firing that can be utilized to explain the decision to others, whether internally or externally. In practice, in fact, an odd side effect of this systematic approach is that many problem volunteers decide to voluntarily resign rather than face the inevitable and seemingly inexorable conclusion of the process. Most people prefer not to sit in front of an oncoming train...

Conducting the Firing Meeting Regardless of the system utilized to reach the decision to terminate, someone has to actually convey that decision to
the volunteer. This will never be a pleasant experience, but here are some tips which may help:

· **Conduct the meeting in a private setting.** This will preserve the dignity of the volunteer and perhaps of yourself

Be quick, direct, and absolute. Don't beat around the bush. It is quite embarrassing to have the volunteer show up for work the next day because they didn't get the hint.

Practice the exact words you will use in telling the volunteer, and make sure they are unequivocal. Do not back down from them even if you want to preserve your image as a 'nice person.'

Announce, don't argue.
they are being separated from the agency. This meeting is not to re
because, if you followed the system, all the arguments have already been heard. You should also avoid
arguing to make sure you don't put your foot in your mouth while venting your feelings. Expect the volunteer to
vent, but keep yourself quiet.

Don't attempt to counsel. If counseling were an option, you would not be having this meeting. Face reality; at
this point you are not the friend of this former volunteer and any attempt to appear so is mix-guided and
insulting.

Follow-up. Follow-up the meeting with a letter to the volunteer re-iterating the decision and informing them of
any departure details. Make sure you also follow-up with others. Inform staff and clients of the change in
status, although you do not need to inform them of the reasons behind the change. In particular, make sure
that clients with a long relationship with the volunteer are informed of the new volunteer to whom they are
assigned.

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Steve McCurley Grapevine Jan/Feb 1993

Motivation and Recognition

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Susan's Tip of the Month:
"Top 10 Reasons Why Volunteers Leave"

Having just reminded everyone of upcoming volunteer recognition events, we might also keep in mind that not every volunteer feels appreciated.

American late night talk show host David Letterman is noted for his daily "Top Ten List." With acknowledgement to his concept, Susan offers her "Top 10 Reasons Why Volunteers Leave" their volunteer commitment. These are her opinions, developed over many years of watching and listening. Do these ring true for you?

Start the drum roll, please.

Reason #10 for why volunteers leave:
The reality of their experience is not what they expected when they signed on.

Reason #9:
They don't like the work they are being asked to do nor how it is being done.

Reason #8:
Veteran or leadership volunteers won't let them into the "insider" group.

Reason #7:
They spend more time meeting than doing.

Reason #6:
No one listens to their suggestions.

Reason #5:
They feel unrecognized, and see that thanks are unfairly given to everyone, no matter who did the most work or none at all.

Reason #4:
They are no longer *asked* to participate.

Reason #3:
They do not actually understand *how* to get more involved.

Reason #2:
They can no longer see how their involvement makes a difference.

And the #1 reason volunteers leave is:
It stopped being fun.

About us
Energize empowers and inspires leaders of volunteers worldwide. Our specialty is creating and selecting the most relevant, innovative resources in volunteer management. We're advocates for the power of volunteers and for the recognition of the leaders who unleash it.

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Taking Care of Your Volunteers

Without your volunteers, how long could you stay in business? Imagine if no one showed up— ever again. Scary thought? You bet! Those volunteers are the backbone of your organization. And figuratively speaking, they need a massage. Our guest editors are experts in the field of volunteer management. They understand the importance of taking good care of volunteers from the day they first make contact through to the completion of successful community programs. In the following articles, our experts share what they've learned about interviewing potential volunteers, matching volunteers with the right jobs, making volunteers feel a part of the system and recognizing efforts.

Workshop, a standing feature of *Volunteer Leadership*, offers how-to tips and valuable insights on selected topics. If you'd like to be a guest editor or want to suggest topics for future coverage, write to Volunteer Leadership Workshop, The Points of Light Foundation, 1737 H St. NW, Washington, DC 20006; fax 202-223-9256; e-mail: janemch@aol.com.

Resources

The following books are available through The Volunteer Marketplace Catalog, 800-272-8306.

Stop Managing Volunteers! New Competencies for Volunteer Administrators, by Sue Vineyard, includes worksheets to apply to your own program, $15.

Beyond Banquets, Plaques and Pins: Creative Ways to Recognize Volunteers and Staff, by Sue Vineyard, tells how to tailor recognition to the needs, wants and values of your volunteers, $8.

Team Power, by Jim Temme, includes exercises to help your team work together smoothly and tips from experienced volunteer program leaders, $20.95.

Episodic Volunteering: Building the Short-Term Volunteer Program, by Nancy Macduff, covers how to custom-design volunteer jobs for individual volunteers' needs, $8.

Recruiting Volunteers for Difficult or Long-Term Assignments, by Steve McCurley, includes information about job design, evaluation and explanations of how to get volunteers interested in difficult assignments, $8.

Ironing It Out: Seven Simple Steps to Resolving Conflict, by Charles Lickson, includes ground rules for recognizing and dealing with conflict, $15.

What Motivates Volunteers

By Jackie Sinykin

When volunteer program managers express concern about the numbers of volunteers leaving, I often wonder if they have discovered why people volunteered with their program. Were those reasons considered when planning for placement, supervision and recognition of the individual?

Molly had just moved to town. She wanted to volunteer in order to meet people, develop relationships and begin to have a social life. Placing her in a volunteer position where she could develop relationships and enjoy mutual friendships is important; if we don't respond to her needs, she will go elsewhere to get them met!

Researchers David McClelland and John Atkinson have identified three forces that motivate human behavior: achievement, affiliation, and power:

■ Achievement-motivated people desire self-advancement and growth. As volunteers they like to work toward goals, are organized, enjoy challenges, are concerned with personal best and can work well alone.

■ Affiliation-motivated people want to be with others to make contacts and expand their circle of acquaintances. They seek volunteer positions that are relationship opportunities; are concerned about how people are feeling and the needs of others, as well as what

Jackie Sinykin is executive director of The Volunteer Center, St. Paul, Minnesota.

people think about them. The affiliator type prefers to work with other people rather than alone.

■ People who want to impact, influence and inspire others are motivated by power. They can work alone or with others, think information is critical and like to be used as a resource. "Power people" are concerned for position, respect and reputation, may be quite charismatic and are able to exercise power to benefit others.

Everyone has all three types of motivation, but one type tends to dominate at any one time. And people change constantly. Molly volunteered at Newheart Organization to meet people (affiliation). She was voicing displeasure with her committee and social activity work within six months. She wanted to become more involved in fundraising and felt she was ready to chair the new member task group (achievement). Nine months after beginning fundraising activities, Molly was leading community fundraising for the organization and directing the work of 10 others to that aim (power).

These three classifications of motivation are the overall categories for the myriad of reasons people volunteer. But there are many sub-categories that include such reasons as exploring career interests, improving the community, using professional skills more creatively than permitted on the job, changing public policy and remaining active.

Finding fulfillment for the initial reasons to volunteer is the first appeal for most people—even if they are unaware of why they initially selected the program. The

reasons that people volunteer should be an influence in planning every management area, including how volunteers are oriented, trained, supervised and recognized. Understanding what motivates volunteers from the beginning of their involvement and for as long as they remain successfully involved is good for the entire volunteer program.

Although there are many variables which influence whether a volunteer stays in a program, responding to the person's motivations may be the best way to decrease turnover of volunteers and eliminate the constant need to invest in recruitment, orientation and training efforts.

The volunteer who is an achiever wants concrete feed to improve performance, but wants to be left alone to do the work. This achiever will be happy to put a certificate on the wall. The affiliation-oriented volunteer wants a caring supervisor who will spend some time chatting and welcomes advice, but will avoid conflict at all costs. This volunteer feels rewarded by a social get-together. The volunteer motivated by power wants strong leadership and likes to know limits of authority. Including this person in decision-making and planning as well as enabling association with "power brokers" is valued recognition.

Molly is content in her volunteer position because the volunteer program manager noted her shift in motivation and responded accordingly. Chances for retention of volunteers are raised when we are responsive to m tions in recruitment, placer supervision and recognition.

Involve Volunteers in Making Decisions

By Ruth Herman

Women in Community Service (WICS) is dedicated to reducing the number of young women living in poverty by promoting self-reliance and economic independence. WICS volunteers represent diversity, community access, extended relationships, flexible and personalized services. WICS volunteers have the power to transform their neighborhoods, to inform the electorate, to create partnerships that span the private and public sectors.

How can WICS best capitalize on this human resource? First, we must articulate the history, values, mission and vision of the organization. That allows volunteers to be clear about what to expect, how they can fit in, what outcomes they might expect by being a part of the effort. Then we must create an environment that allows WICS to flourish as a diverse, inclusive, learning organization that fosters respect, dignity and sensitivity to others.

Recently WICS developed a set of core values to serve as a benchmark to all staff and volunteers. One of these unifying principles states: WICS fosters community service and volunteerism by providing challenging volunteer opportunities throughout the organization.

Recruitment campaigns target community members with specific

Ruth Herman is executive director of Women In Community Service.

talents and experience so that the volunteer offers much more than the availability of time. WICS' volunteer force has taken the lead in curriculum development, workshop facilitation, fund raising and public relations insights.

WICS believes that volunteer satisfaction will reflect the level of decision-making each person can exercise. To start with, volunteers are offered choices:

- working from home or a program site;
- on-going assignments or one-time commitments;
- involvement that takes advantage of their professional skills;
- assignments that offer new learning opportunities;
- direct client contact or administrative position.

As an organization, we have made a commitment to be inclusive and cross-cutting with all task forces and work groups. Each team leader is urged to involve volunteers on every team. To the greatest possible extent, assignments match the talents, experience and interests of volunteers. Each team member is actively involved in the decisions related to the specific goals.

Bolstered by the quality and commitment of the volunteer force, WICS has moved into more challenging situations: correctional facilities, homeless shelters, drug treatment programs. At each juncture, community members have responded to the challenge with the simple request and expectation that training, support and community resources be available to them as they take on these new assignments.

With a constant dialogue regarding best practices and WICS' values, these volunteers are essential to defining their own support needs and advising staff on how to best ensure that these needs are met.

One of the most important volunteer roles within WICS is service on the board of directors. This is the arena where the organization's culture is shaped, future opportunities forecast and alliances forged. To have the most informed decisions made at the board level, the members have determined that all board committees or work groups must include participants outside the current board membership. Also, when considering strategic planning or articulating core values, the board invites participation through focus groups, surveys and site visits to ensure the broadest base of participation.

To be the most responsive to the unique needs and opportunities in each community, WICS is forming alliances in key communities across the country. These alliances invite concerned citizens from the public and private sectors to join us in addressing the issues facing young women in poverty in their community. These alliances advise on the best way to apply the organization's research and experience within that particular community.

With volunteers taking such an active role in the decisions relating to their community, we believe they will become valuable advisers to the board of directors as they anticipate future trends, potential funding opportunities and citizen interest. ■

Recognition Plays a Key Role

By Maggie Gosey

Fort Smith, Arkansas, seems to have the handle on altruistic spirit. With 120 nonprofit agencies in place, we have an army of energy. To harness that energy and direct it toward these various missions is a challenge. To keep them coming "back for more" takes creativity, tenacity and perseverance. We've learned that attention needs to be constant, ongoing, personal and public. The better your perception of what volunteers expect to get in return, the better you can be at enabling that process. Recognition takes creativity. Here are ideas:

Put it in writing. One of our standard "pats on the back" is a letter to a volunteer's boss. Let the company know how its employee's contributions of time make an impact on your agency, particularly if the company allows time off. Birthday cards are also a good way to remember volunteers; and they appreciate your acknowledging that they have a life beyond what they do for your organization.

Plan a special event. For example, we schedule special teas at the Arkansas Governor's Mansion in honor of volunteers, often with our first lady as hostess. Or plan a caroling party, cookies and hot chocolate for other agencies.

Be tuned in. Be sensitive to deaths, divorce, births, bankruptcy, etc. If and when you are aware of

Maggie Gosey, CVM, is executive director and founder of the Fort Smith, Arkansas, Volunteer Connection.

such interruptions, offer the volunteer a sabbatical. Chances are he or she will return or perhaps decline the offer, feeling that being busy is good. Certain types of volunteer work can provide healing opportunities. Your awareness is an important part of that.

The better your perception of what volunteers expect to get in return, the better you can be at enabling that process.

Be alert for media chances. Often local newspapers are willing to donate space for ads or pages that honor specific volunteers or even list the names of all your volunteers as a public way of saying thanks. Many newspapers are willing to write feature stories about outstanding volunteers. Ask your local TV and radio stations to mention your volunteer of the year on air during National Volunteer Week. Remember the media wants to be considered a good community partner just like any other business.

Maximize your efforts through partnerships. JCPenney will partner with our agency this year for our first Golden Rule Awards Banquet. In addition to the Golden Rule Awards, the Volunteer Connection's Family of the Year will be named. We also partner with Jaycees, which organizes the annual Christmas Parade. The

Family of the Year serves as Christmas Parade Grand Marshals. (The runner-up family has a tree planted in its honor at our visitors center.) Our annual youth award is a $1,000 scholarship established by a family in memory of their two children.

Use your imagination. Our most creative and public recognition for volunteers is the Volunteer Street. Each year we name a city street in a new development for an outstanding volunteer. It's a permanent way to honor the city's top volunteer.

Here's how you might go about it in your hometown: Present your proposal to the city administrator. If he or she agrees, find out whom to consult next—usually the city department planner. Offer to do leg work yourself and then scout for willing developers.

We worked with several city neighborhood project developers to get a commitment in writing. We learned that when developers submit plans to the city for permits, code approval, etc., streets must already be named. The City of Fort Smith agreed to allow the developer to designate one street "Volunteer Street" until we name the year's outstanding volunteer.

We make the announcement at our annual banquet, at which time the mayor unveils the official sign. Presently we have a major developer who has agreed to make this possible every year.

Finally, get back to basics. Say "thanks" often and sincerely. Don't get too busy or too stressed to take the time to express gratitude. Remember, without your volunteers you'd be out of business. ■

McClelland's Social Motivators
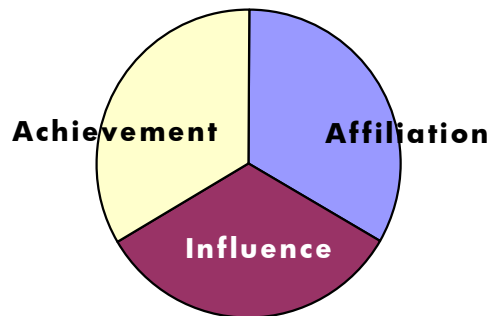
Achievement Motivations

Desire for excellence
Want to do a good job
Need a sense of accomplishment
Want to advance
Desire feedback

Influence Motivations

Likes to lead
Enjoys giving advice
Likes influencing an important project
Enjoys job status
Like to have their ideas carried out

Affiliation Motivations

Like to be popular
Like to be well thought of
Enjoy and want interaction
Dislike being alone in work or play
Like to help others
Desire harmony

10

Motivational Analysis

Directions: Each of the following items consists of three related statements. Mark the statement that most closely describes your preference, most of the time. There are no right or wrong answers.

1. _____ a. When doing a job, I prefer to have specific goals.
   _____ b. I prefer to work alone and am eager to be my own boss.
   _____ c. I seem to be uncomfortable when forced to work alone.

2. _____ a. I go out of my way to make friends with new people.
   _____ b. I enjoy a good debate.
   _____ c. After starting a task, I am not comfortable until it is completed.

3. _____ a. I enjoy offering advice to others.
   _____ b. I prefer to work in a group.
   _____ c. I get satisfaction from seeing tangible results from my work.

4. _____ a. I work best when there is some challenge involved.
   _____ b. I would rather give direction than take direction from someone else.
   _____ c. I am sensitive to others—especially when they are mad.

5. _____ a. I like being able to influence decisions.
   _____ b. I accept responsibility eagerly.
   _____ c. I try to get personally involved with my superiors.

6. _____ a. I place importance on my reputation or position.
   _____ b. I have a desire to out-perform others.
   _____ c. I am concerned with being liked and accepted.

7. _____ a. I enjoy and seek warm, friendly relationships.
   _____ b. I attempt complete involvement in a project.
   _____ c. I want my ideas to predominate.

8. _____ a. I desire unique accomplishments.
   _____ b. It concerns me when I am being separated from others.
   _____ c. I have a desire to influence others.

9. _____ a. I think about consoling and helping others.
   _____ b. I am verbally fluent and persuasive.
   _____ c. I am restless and innovative.

10. _____ a. I set goals and think about how to attain them.
    _____ b. I think about ways to change people.
    _____ c. I think a lot about my feelings and the feelings of others.

Adapted from Mackenzie, Marilyn and Gail Moore. The Volunteer Development Toolbox. 1993.

Motivational Analysis Key

United Way of King County

Directions: Record you choice of each statement by putting a mark or check in the space provided below for each of the three motivators. If your answer to #1 was "b," you would put a mark on the line titled "influence." Do that for each question. Then add the total number of marks for each of the three categories: achievement, influence, and affiliation.

1. _____a. achievement _____b. influence _____c. affiliation	6. _____a. influence _____b. achievement _____c. affiliation
2. _____a. affiliation _____b. influence _____c. achievement	7. _____a. affiliation _____b. achievement _____c. influence
3 _____a. influence _____b. affiliation _____c. achievement	8. _____a. achievement _____b. affiliation _____c. influence
4. _____a. achievement _____b. influence _____c. affiliation	9. _____a. affiliation _____b. influence _____c. achievement
5. _____a. influence _____b. achievement _____c. affiliation	10. _____a. achievement _____b. influence _____c. affiliation

ACHIEVEMENT _____

INFLUENCE _____

AFFILIATION _____

Adapted from Mackenzie, Mary and Gail Moore. The Volunteer Development Toolbox. 1993.

Recognition Matters

1. Appreciation and recognition really matter to people, performance, and the organization.

2. The most fundamental form of recognition is your attention. Make eye contact, smile and say "Good morning" and use the person's name. It sends the message that "you belong here."

3. Appreciation starts with awareness: being aware of the things people do well. Recognition is simply "noticing out loud" by saying "thank you," making a positive comment, or writing someone a note that what they do makes a difference.

4. Recognition is a gift. Treat people with respect & appreciation That's what really determines whether or not they'll stay and how engaged they are.

5. Recognition should be linked to real performance. It's about acknowledging the positive behaviors, actions, or results that support the company values and goals.

6. We need "Volunteers of the Moment" more than we need "Volunteers of the Month."

7. Recognition should be personal. One size does not fit all. Get to know volunteers and find out how they like to be recognized.

8. Volunteers can participate in determining recognition methods. People own what they create and want to see it succeed.

9. There should be many sources and forms of recognition available: service milestones, performance awards, formal, informal, and day-to-day types of recognition. It can come from leaders, staff, other volunteers and clients.

10. Consistent excellence is a matter of design. When we recognize & reinforce positive behaviors, they are more likely to be repeated.

11. You can give recognition even if you're not getting it.

12. You don't have to be friends with people to recognize or appreciate them for their positive contributions.

13. You don't need management buy-in or a program to recognize someone for great work. Start appreciating others more within your immediate sphere of influence.

14. By the way, volunteer managers and volunteer supervisors need recognition, too.

Inspired by Wendy Leebov's Work, Adapted from Theresa Chambers, Recognition Works www.recognitionworks.net

Creative Volunteer Recognition Ideas

Quotes with Funny Small Gifts

"What a bright idea!" - attached to a light or Christmas bulb.

"A Cracker Jack idea!" - with a box of Cracker Jacks.

"Your ideas are so exciting I could pop." - with a balloon or bottle of pop.

"Thanks for raisin' the tough questions!" - with a mini-box of raisins.

"Your great work has wreathed me in smiles" - with a small grapevine wreath.

"I'm lucky to have you to help..." - attached to a rabbit's foot.

"No one holds a candle to you." - scented votive candle or box of birthday candles.

"You are a Lifesaver!" - with a roll of Lifesavers.

"You're the apple of my eye." - with an apple.

"Your vision if our guiding light." - a mini-flashlight.

"You have given our project the sweet smell of success." - Potpourri or sachet packet.

"Your presentation was right to the point." - box of tacks or push pins.

"Thanks! You've energized us." - a battery.

"By any measure, you are a leader." - tape measure or ruler.

"Sorry - I didn't mean to hurt your feelings." - a band-aid.

"Thanks for all your hard work...I know it has been a headache." - small box of aspirin.

"We'll help you see this project through." - with goofy joke glasses.

"I know you're feeling snowed under right now." - with small snow globe.

"You are a doll!" - with a small doll.

"Many motivated and marvelous volunteers." - with M & M's.

"You take the cake!" - cupcakes or a cake.

"Thanks for working your buns off." - Cinnamon rolls or sticky buns at a meeting.

"A toast for a job well done." - jelly beans in a plastic wine glass.

"Let me know when I can come out." - a paper dog house.

"A noteworthy accomplishment." - with note cards or paper.

"You are 'berry' special." - box of fresh berries or jam.

"Thanks to you, we'll soon have this project wrapped up!" - a roll of wrapping paper.

"Hugs and kisses..." - Hershey's chocolate kisses.

"Thanks for sharing your creative juices..." - with a box of juice.

"Thanks for sticking to your job." - stick of gum or bottle of glue.

Creative Volunteer Recognition Ideas

The Light Touch

Name the coffee pot each month after a volunteer who has "served" well.

Create a volunteer survival kit (band aid, coffee certificate, candy, aspirin).

Send anonymous, humorous cards during hectic times.

Leave candy or candy kisses at volunteer stations.

Send valentines year round.

Dress in costume at Halloween, Christmas, Easter...and pass out treats.

"Come as you are" surprise party.

Silly posters.

Anonymous notes on the bulletin board.

Fillers in agency newsletter regarding volunteers.

"Handle with care today - fragile." stickers for volunteers during hectic times.

"Roasts."

General

Stop by while volunteers are working and talk with each of them.

Smile and call the volunteer by name.

Remember birthdays, anniversaries, personal dates of importance.

A regular parking space.

Comfortable climate control.

Stable work space.

Personalized coffee cups.

Labeled area to place coat, hat, etc.

Access for handicapped.

Opportunity to create/decorate a personal area.

Keep track of volunteers hours for accurate recognition.

Chart to show accumulated hours for individuals or teams.

Suggestion box.

Volunteer of the week, month, year awards.

Team leadership rotated.

Inclusion in paid staff meetings.

Referring to work corps as "staff" - some paid, some non-paid.

Volunteer profiles posted in-house or in newsletters.

Chart showing dollar value of efforts of volunteers.

Job opportunity board (paid and non-paid).

Training opportunities, internal and external.

Creative Volunteer Recognition Ideas

General continued

Insure paid staff understand appreciate specific job descriptions of volunteers.

Insure volunteers understand appreciate specific job descriptions of paid staff.

Job descriptions for volunteers that are specific, clear, flexible.

Flexibility within job assignment.

Appropriate evaluation directed to issues, not personalities.

Immediate corrections of errors so they will not be embarrassed by repeats.

Respect of individuality and uniqueness.

Very public "thank you's" on billboards, etc. in town.

Honest listening.

Open communication.

Break area with coffee, chairs, basketball hoop, checkers, magazines, etc.

Surprise treats to say thank you.

Holiday parties.

Kickoff potluck (possibly with family).

Monthly birthday listing posted for all to see.

Job titles that are clear and reflect what person will or does do.

Authority delegated in line with responsibility.

Keeping volunteers abreast of changes.

Giving people reasons behind change.

Sensitivity to change in group dynamics.

Flowers in the volunteer area.

Decorations for special holidays - recognize all religions.

Send "get well" cards.

Tell people they are missed when they are gone.

Know assignments of volunteers and paid staff.

Have recognition events with other agencies in the area.

Arrange for discounts in area stores, restaurants, theatres, etc.

An honor roll of volunteers in public area of agency.

Put a "smiley face" on all clocks.

Offer good, practical training and orientation.

Sabbaticals for "burned out" volunteers.

Job rotation opportunities.

Creative Volunteer Recognition Ideas

For Youth

Document of training, skills developed, experiences, for resume.

Letters or recommendation to parents, schools, possible employers.

Letter to editor of school or town paper with article.

Opportunities to speak to other youth and adults about involvement.

Possible credit for classes being taken.

Shortened job assignments rather than extended commitments.

For Volunteers with Limited Time

Flexible work opportunities.

Job sharing.

Child care.

Work to do at home and at own pace.

Letters of commendation to employer, school, etc.

Shorter project oriented jobs.

Renegotiate assignments, make work load changes.

For Seniors

Transportation allowances or arrangements.

Meals at site.

Discount coupons for services, food, entertainment, etc.

Parking space near entrance.

Socialization opportunities at peak "lonely" times (holidays, weekends).

Recreation opportunities.

Networking information to those agencies / people who might help them.

Keeping abreast and sharing useful information that affects them (Soc. Sec. etc.).

For Volunteers Seeking New Skills

Opportunity to try new things in safe setting.

Opportunity to try new things as part of a working team.

Training, both internal and external.

Recording of new skills, experience and training for resume.

Appropriate evaluations.

For Volunteers Seeking Visibility within Other Areas of Their Life

Letters to employer.

Awards presented, for display, to company for which they work.

Media coverage.

Creative Volunteer Recognition Ideas

For Church Volunteers

"Good Samaritan" award.

Service pins with church symbol.

Baby sitting service.

Job designs clearly spelled out.

Bulletin board with pictures, names and efforts.

Volunteer of the Week, Month, Year.

Volunteer spotlight, article in church newsletter.

Tapes of job instructions for blind volunteers.

Written job instructions for hearing impaired.

Give gift of photo or drawing of church.

Bible or prayer book inscribed to volunteer.

Honor gift given to church in name of volunteer.

Lending library.

Trade Fair - newsletter or bulletin board listing items/services to sell or trade.

For Hospital Volunteers

Free meals.

Designated parking space.

Special break area.

Personalized coffee cup.

Occasional treats in volunteer area.

Name badges, service pins, etc.

Bulletin board in lobby highlighting volunteer activities.

Award given in honor of volunteer.

Honor gifts made to hospital in name of volunteer.

Sites in hospital named for outstanding volunteers.

Use volunteers in training and orientation roles.

Community newspaper coverage for volunteer efforts.

Flowers and notes left at volunteer station.

Special badges for length of service or "Volunteer of the ...".

Honor roll in public area.

Holiday parties.

Thank you notes from patients, families to volunteers.

Write ups in hospital newsletter and/or national hospital magazines.

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Creative Volunteer Recognition Ideas

For Hospital Volunteers continued

A volunteer newsletter.

Job opportunity board.

Laundry service for uniforms.

Letter of commendation from Board of Directors.

Discount in gift shop.

Mileage allowances.

Trade Fair - newsletter or bulletin board listing items/services to sell or trade.

For Lower Income Volunteers

Transportation allowance or arrangement.

Meals.

Uniforms.

Any paying or stipend opportunities.

Networking and referral information to those who might help.

Discounts for goods, services.

Helping them barter for goods, services.

Work opportunities in healthful climate in extreme weather.

Child or senior care, if needed.

For Volunteers Supervised Long-Distance

Keep notes on phone conversations.

Call or send card on personal dates of importance to volunteer.

Schedule of regular phone conversations, with an agreed upon agenda.

Follow up, when necessary on phone conversations with letter.

Periodically fax fun memos.

Visits by people connected with agency who are in the volunteer's area.

Round robin newsletters from separated volunteers.

Personalized, hand-written notes.

Phone calls from higher authorities or dignitaries thanking them.

Gifts from clients, field programs, sites.

Anonymous notes and candy kisses in the mail.

Permanent piece of jewelry or badge designating belonging to organization.

Wall plaques noting service.

Regularly scheduled meetings to upgrade training, inform, socialize and "recharge."

In-person supervisory meetings as needed by both volunteer and/or supervisor.

Listening to personal concerns.

United Way

United Way of King County

This worksheet can be used to examine your program's ability to effectively recognize and retain volunteers. Complete the following questions, and try to think as creatively as possible!

Volunteer Retention

"Retaining your volunteers is the key to success. There is no point in being good at recruitment if you cannot keep volunteers coming back. Recruitment is a solution to the problem of not having enough volunteers; retention is a way to avoid the problem altogether." (Volunteer Management, McCurley and Lynch)

What can you do to make volunteering for your organization more fun?

How can you help volunteers achieve success as they complete small projects and tasks?

How can you help the volunteers achieve small successes as they work on long-term projects?

What can you do to connect volunteers to the entire organization (other staff and the mission)?

Volunteer Recognition

Volunteers need the appropriate support and recognition to be effective, and it's your role to provide this. All volunteers have motivations for volunteering and it is your role to make sure that in exchange for their contribution to your organization, you are meeting their motivational need. There are many motivations for volunteering including gaining knowledge about the community, gaining or using skills, meeting new people and socializing and to be a part of a group or team. Meeting a volunteers motivations is at the center of their retention.

In the space below, write down some of the names of volunteers in your program. Next to their name, identify their motivation for volunteering.

1.

2.

3.

4.

You can identify ways to recognize volunteers based on their motivation. Write down methods of recognition for the volunteers you listed above based on their motivation.

1.

2.

3.

4.

Volunteers have a wide variety of needs and by identifying these you can enhance their volunteer experience and maximize their potential and contributions.

"Volunteers are unique individuals. In order to design and implement appropriate recognition we need to understand as much about the volunteer as possible, avoiding assumptions and stereotypes."

-Sue Vineyard

The Top 25 Methods to Retain Volunteers

By John L. Lipp

25. Each of us has our own motivators. If you really want a volunteer to stay, learn what motivates that person and then put that information into practice.

24. Successfully place the volunteer in the beginning. If you place a volunteer in a position that maximizes their potential for success - logic says that they will succeed. And successful people tend to be happy people who tend/want to stay.

23. If your agency doesn't already have one, hire a professional volunteer program manager.

22. Don't be afraid of saying "Thank You" too much. I've never heard of a volunteer quitting because they felt over appreciated. Over worked, yes! Over appreciated, no!

21. Vary your recognition program. The same old banquet every year with the same old rewards gets boring. When volunteers stop attending because they've already re-papered their house in certificates of appreciation, you know it's time to move on to something new.

20. Take the time to train your volunteers so that they know what they need to know to do their job.

19. For no reason at all, send your volunteer a note just to say "hi."

18. Once a year, ask the volunteers to give an anonymous evaluation of the agency, the paid staff and programs (including the volunteer program).

17. Promote volunteers to new positions that require new skills, additional training and added commitment. Just because Dan is great at stuffing envelopes doesn't mean that he is going to be happy doing it for the next ten years.

16. Acknowledge that the agency is not your volunteer's number one priority in life. Guild may have worked for your parents, but it doesn't work with volunteers.

15. Don't call the same volunteers over and over again. It's too easy to become dependent on the "Yes" people and burn them out. Plus, you miss out on developing a whole new pool of talent.

14. Use the media to promote your active volunteers. The media just loves stories about volunteers. Next to all the depressing headlines, these stories create a nice balance. Plus, no matter what they say, people just love to see their name in print.

13. Begin a Volunteer Advisory Committee. (Note: The key word is "advisory.") Such committees help to empower the volunteers, giving them a stronger connection to the agency and its mission, and a reason to stay involved.

12. Practice the fine art of informal evaluations. It's amazing how much feedback you can get by just chatting with volunteers.

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The Top 25 Methods to Retain Volunteers

By John L. Lipp

11. Resist the urge to "play favorites." In other words, be consistent with your policies.

10. Always emphasize your agency's mission statement. People no longer volunteer for agencies, they volunteer for causes.

9. Be flexible as an agency.

8. Be flexible as an individual.

7. Smile. No matter how much you want to grab the computer terminal and throw it across the room, don't let it show. Never let them see you stress.

6. Make the volunteer environment at your agency fun. No matter what work the volunteers are doing, they should have a good time doing it.

5. Set limitations with the paid staff. If the Operations Manager suggests that they use volunteers to clean up at the annual "Farm Animal and Petting Zoo Fund-raiser," just say "No!" Your volunteers are too valuable to be given tasks that nobody else wants to do.

4. Every once in a while, work along side your volunteers. Give them the sense of teamwork and the knowledge that you won't ask them to do anything that you wouldn't do yourself.

3. Consider your volunteers as unpaid staff and include them whenever possible in office parties, lottery pools, etc.

2. Be sure to balance the needs of the agency with the needs of your volunteers. Remember, it has to be a mutually satisfying relationship for both parties.

And the number one method for retaining volunteers:

1. Convince the entire paid staff to follow rules 2 through 25 because one person can't do it alone. Volunteer programs only work with a commitment that starts at the very top of the organization and continues all the way down through each successive level.

101 WAYS TO RECOGNIZE VOLUNTEERS

Smile.

Put up a volunteer suggestion box.

Treat to a soda.

Reimburse assignment related expenses.

Ask for a report.

Send a birthday card.

Arrange for discounts.

Give service stripes.

Maintain a coffee bar.

Plan annual ceremonial occasions.

Invite to staff meetings.

Recognize personal needs & problems.

Accommodate personal needs & problems

Be pleasant.

Use in an emergency situation.

Provide a baby sitter.

Post Honor Roll in reception area.

Respect their wishes.

Give informal teas.

Keep challenging them.

Send a Thanksgiving Day card to the volunteer's family.

Provide a nursery.

Say, "Good morning!"

Greet by name.

Provide good pre-service training.

Help develop self-confidence.

Award plaques to sponsoring group.

Take time to explain.

Be verbal.

Motivate agency VIP's to talk with them.

Hold debriefing/rap sessions.

Give additional responsibility.

Afford participation in team planning.

Respect sensitivities.

Enable to grow on the job.

Enable to grow out of the job.

Send newsworthy items to the media.

Have wine and cheese tasting parties.

Ask clients to evaluate their service.

Say, "Good afternoon!"

Honor their preferences.

Create pleasant surroundings.

101 WAYS TO RECOGNIZE VOLUNTEERS

Welcome to staff coffee breaks.

Enlist to train other volunteers.

Have a public reception.

Take time to talk.

Defend against hostile or negative staff.

Make good plans.

Commend to supervisory staff.

Send a Valentine.

Make thorough pre-arrangements.

Persuade paid staff to equate volunteer experience with work experience.

Admit to partnership with paid staff.

Recommend to prospective employer.

Provide scholarships to volunteer workshops or conferences.

Offer advocacy roles.

Utilize as consultants.

Write them thank you notes.

Invite participation in policy formulation.

Surprise with coffee and cake.

Celebrate outstanding projects.

Nominate for volunteer awards.

Have a "President's Day" for new presidents of sponsoring groups.

Carefully match volunteer with job.

Praise them to their friends.

Provide substantive in-service training.

Provide useful tools in good working condition.

Say, "Good night."

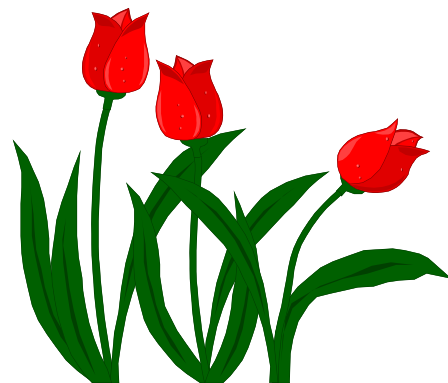Plan staff and volunteer social events.

Be a *real* person.

Rent billboard space for public laudation.

Accept their individuality.

Provide opportunities for conferences and evaluations.

Identify age groups.

Maintain meaningful file.

Send impromptu fun cards.

101 WAYS TO RECOGNIZE VOLUNTEERS

Plan occasional extravaganzas.

Instigate client planned surprises.

Utilize purchased newspaper space.

Promote a "Volunteer of the Month" program.

Send letter of appreciation to employer.

Say, "We missed you."

Plan a "Recognition Edition" of the agency newsletter.

Color code name tags to indicate particular achievements (hours, years, unit, etc.)

Send commendatory letter to prominent public figures.

Praise the sponsoring group of club.

Promote staff smiles.

Facilitate personal maturation.

Distinguish between group and individuals in the group.

Maintain safe working conditions.

Adequately orientate.

Award special citations for extraordinary achievement.

Fully indoctrinate regarding the agency.

Send Christmas cards.

Be familiar with the details of assignments.

Conduct community wide, cooperative, inter-agency recognition events.

Plan a theatre party.

Attend a sports event.

Have a picnic.

Say, "Thank you!"

Smile.

Program Evaluation and Record Keeping

TABLE OF CONTENTS

For the Record: Effective Volunteer Management
Through Documentation

IT'S
TIME TO
EVALUATE

EVALUATING VOLUNTEERS, PROGRAMS AND EVENTS

United Way

United Way of King County

By Sue Vineyard

To many people the word "evaluation" means "judgment" and conjures up pictures of final exams, parental assessments, boss's pronouncements or promotion considerations.

"Evaluation" brings shudders to others as they recall times when they were judged harshly, unfairly or inappropriately. Though most managers know it as a part of management, few relish this critical phase of the process.

What is it that causes such negative vibes? Why do so many people dread having to give or receive evaluations? Why is this part of the management process so often omitted working with volunteers?

The answer is simple: Evaluation has been done inappropriately in the past and therefore has had very negative consequences.

In the case of assessing volunteers, inappropriate evaluation has led to their departure. In the case of paid workers, it has resulted

in disillusionment and defiance. And with programs and events, it has caused discouragement and disassociation.

All of these results, even when they happen infrequently in an organization or agency, are too high a price to pay!

It is up to those of us who are charged with the responsibility of managing programs and people to understand evaluation and use it as a positive tool for growth and success.

Evaluation and the Management Process

To understand evaluation, we must first understand where it fits into the management process. For many years I have used the symbol of a bridge, which spans the dreams we have and the

realization of those dreams, to characterize the entire management process:

Evaluation falls in the fifth function, "Assess," and is the final link between our dreams and their realization.

The stage for evaluation is set during the first and second management functions where what is to be accomplished is determined and mapped out.

The Planning Function and Evaluation

During the planning function, goals and objectives are set very specifically. This tells us what is to be accomplished by individuals, programs or events and is *specific* (how much? when? etc.), *measurable* (for evaluation purposes), *achievable* (realistic) and *compatible* with the overall goal of the agency or organization.

This goal setting is fundamental to good evaluation, which must focus on events and specific

Staff / Organize / Direct / Plan / Assess / Dream / Realization

---

accomplishments, never personalities. It tells us the expectations we have at the outset for results and therefore establishes a gauge by which actions and results can be measured.

If we set an objective that states a volunteer will make three public presentations regarding our agency over a two-month period and this is accomplished, the evaluation will reflect the success of this accomplishment. If the three presentations are not made, focus can be placed on the objective agreed on rather than any personal failure of the volunteer. "Let's talk about why only one presentation was made rather than the three agreed on" is a better approach than "Why didn't you make three presentations?" which is a negative "You" message.

The Organizing Function and Evaluation

Under the second function of management--organizing-- plans of action and job designs are created that spell out expectations and action steps even more clearly.

Remember, the goal of evaluation is to help people feel successful by specifically acknowledging their progress. The best way to accomplish this is to insure that the person carrying out the responsibility for the action understands clearly what is to be done. The plans of action and the job create this understanding.

The plans of action should tell who is to do what, when, how and at what cost (time, energy, resources, etc.). The job design, which is the most critical tool leading to the

evaluation, should be very specific telling:
- **Title** Use simple truth in packaging here! If the person is to coordinate mailings, the title needs to be Mailing Coordinator, not "Director of Communications Management, Handling and Interaction, Discipline"! (Gag)
- **Responsible to:** Be specific as to whom this person reports. You may even want to supply information on your chain of command so the person knows he or she reports to Mary Smith who reports to the Board of Directors, etc.
- **Responsible for:** Specifically list duties here, i.e., "Set up and deliver three speeches to membership organizations in town by June 30th with the goal of recruiting

> The goal of evaluation is to help people feel successful by specifically acknowledging their progress.

five volunteers from each to work on our September 5th health fair at Edwards Hospital."
- **Skills Required:** Again, be specific, i.e., public speaking, motivation, knowledge of agency/causes/needs, organization, etc.
- **Time Required:** In this section, try to share two perspectives of time commitments: (1) how long they will have this job (I urge one-year limits) and (2) how

much time during that year it will take (three hours per week; ten hours per month; 50 hours during the year at their choice? etc.).
- **Parameters:** In this section of the job description, you describe any additional information that would clarify the volunteer's job and responsibilities. This often "fleshes out" expectations, rules, regulations, past history, assistance and training provided, etc. It always tells the person how he or she will be held accountable, i.e., "An informal discussion to explore results will be held by the entire committee one week after the event" or, "We'll schedule an evaluation of results of the work with you using the attached form during the 12th and last week of your work," etc.

The job description is the key tool to effective evaluation, because it spells out expectations and responsibilities and therefore defines what areas of accountability will be addressed in the future.

The Dual Evaluation System

During the first discussion of the job and the review of the job description, any evaluation form to be used for an individual or group needs to be given to the person accepting the responsibility.

This then allows the person(s) involved to know from the outset how they are to be held accountable.

Before the pre-set evaluation time is held, by mutual agreement (surprise evaluations are unfair), both the supervisor and the job holder fill out the form from

their perspective, comparing their judgments. Obviously, the supervisor's copy, sometimes adjusted because of the input of the job holder, is placed on file for future reference.

Clarity--A Key to Good Evaluation

All of this process is dependent on the clarity of the job design as it sketches out for the volunteer, committee, job holder, etc., what is to be done, when, how, where and with what results expected.

It is also critical, as the person accepts a responsibility, that he or she clearly understands the overall goal or mission of the organization.

If a person works for Meals on Wheels for instance, he or she must understand that the ultimate goal is as much personal interactions, nurturing and bonding as it is nutrition!

To truly provide positive, accepted and effective evaluation, we must first set the foundation of well thought-out direction, expectations and objectives.

We must then insure that the person accepting the responsibility understands it thoroughly. Nothing should be left to assumption. Everything should be spelled out in writing and everyone interacting with the responsibility should have a clear understanding of its objectives and placement in any larger picture.

Much of this understanding is dependent upon clear communication, which is another key to good evaluation and must be checked frequently through direct feedback for its continued effectiveness.

Remember that it is not unusual for a person who understood his or her duties as described clearly in May to forget subtle or even blatant points by September. This is especially true of volunteers who accept an assignment in the spring for duties that aren't into full swing before the fall.

Do not assume everything you have explained about an assignment has been understood and kept clearly in mind over a period of time! Check clarity and direction continuously and put all expectations in writing!

A golden rule for any communication is: Never use quarter words when nickel words will do!

Remember that evaluation, to be fair, can only focus on understood responsibilities. A person should not be held accountable for that which they did not know they were to do.

When the Evaluation is Omitted

In working with volunteers, the assessment or evaluation part of the management process is the most likely to be omitted.

Please understand that by doing so, the volunteer administrator, chairperson or supervisor is sending a double message: On the one hand, they are saying (usually during recruitment and assignment): "We really need you to do this important work; it is essential," and on the other hand (by omitting accountability), they're saying: "It really wasn't important, we're not even taking note of your effort."

A second, subtle message we send by not evaluating volunteer efforts is: "Volunteers do not need to be held accountable." Since the general population is aware that paid staff are always held accountable, we're saying that volunteers are of a different, lower status. This simply is not true.

Volunteers need to be seen as a part of any group's staff with their only variance being the way they are rewarded, through personal satisfaction rather than monetarily. To lower standards for volunteers simply because they do not work for a paycheck is to do them a great disservice.

Evaluation is a critical part of managing people, programs or events and when done well and effectively can lead to pride, satisfaction and future growth and success.
Do it!

STAFF ASSESSMENT OF
VOLUNTEER UTILIZATION

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

1. Are volunteers involved in your area of direct responsibility or in your department?
   ❑ Yes   ❑ No   ❑ Don't know

2. In your experience, are the volunteers with our agency adequately qualified for their positions?
   ❑ Yes   ❑ No   ❑ Don't know

3. How would you describe the utilization of volunteers in our agency by other staff?
   ❑ Well utilized   ❑ Generally well utilized, but some bad use
   ❑ Generally not well utilized ❑ Don't know

4. Are the volunteers with our agency adequately trained for their responsibilities?
   ❑ Yes   ❑ No   ❑ Don't know

5. Do you think our staff has been adequately trained in how to work with volunteers?
   ❑ Yes   ❑ No   ❑ Don't know

6. What else should be done to help our staff work better with volunteers?

   _____

7. How would you describe the reaction of our clients to the volunteers?
   ❑ Favorable Mixed   ❑ Unfavorable   ❑ Don't know

8. What benefits do you think we have gained from the utilization of volunteers?

   _____

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

   _____

10. How has your own work load changed as a result of our utilizing volunteers?
    ❑ Lessened   ❑ Remained the same   ❑ Increased
    ❑ Changed in type of work being done

11. How would you describe the assistance you have received from the volunteer director?
    ❑ Helpful   ❑ Not helpful   ❑ Don't know

12. Use the space below to make any comments regarding our utilization of volunteers, any additions you would like to make to your answers to the above questions, or any suggestions you have about how we might make better use of volunteers.

    _____

    _____

Please return this questionnaire to _____ *by* _____ .

VOLUNTEER ASSESSMENT OF THE VOLUNTEER PROGRAM

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

1. How long have you been volunteering with us? _____

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

3. To what extent do you think volunteers are accepted by the staff at our agency?
   ❑ Well accepted   ❑ Generally well accepted, but some exceptions
   ❑ Mixed reception   ❑ Generally not well, but some exceptions   ❑ Not well accepted

4. To what extent do you think volunteers are involved in decisions that will affect their volunteer work?
   ❑ Well involved   ❑ Sometimes involved   ❑ Not well involved

5. To what extent do you think volunteers are accepted by clients?
   ❑ Well accepted   ❑ Mixed reception   ❑ Not well accepted

6. To what extent do you think volunteers feel comfortable with the assignments they are given?
   ❑ Comfortable   ❑ Not very comfortable   ❑ Don't Know

7. Do you feel that volunteers receive sufficient orientation about our agency when they begin work?
   ❑ Yes   ❑ No   ❑ Don't Know

8. Do you feel that volunteers receive enough training in how to carry out their assignments?
   ❑ Yes   ❑ No   ❑ Don't Know

9. In your experience, does your volunteer job match the description of work given to you when you were interviewed?
   ❑ Yes   ❑ Somewhat   ❑ No

10. Do you find your volunteer work to be interesting, challenging, and rewarding?
    ❑ Yes   ❑ Somewhat   ❑ No
    If you answered "No," do you have any comments on why that is? _____

11. Do you think that volunteers are provided with sufficient feedback by those they work with?
    ❑ Yes   ❑ Somewhat   ❑ No   ❑ Don't Know

12. Do you think volunteers have sufficient opportunity to advance in responsibility in this agency?
    ❑ Yes   ❑ No   ❑ Don't Know

15. Can you think of any new areas with which volunteers might be of help in our agency?
    _____

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

17. Overall, how would you rate our volunteer program? (Please circle. 1 = Terrible, 7 = Great)
         1   2   3   4   5   6   7

18. Use the space below to make any other comments regarding our utilization of volunteers, or any additions you would like to make to your answers to the above questions:
    _____

Please return this questionnaire to _____ *by* _____

VOLUNTEER POSITION EVALUATION FORM

NAME OF VOLUNTEER: _____   PERIOD COVERED BY EVALUATION: _____

POSITION: _____   DATE OF EVALUATION: _____

POSITION GOALS

	NOT MET		SATISFACTORY		SUPERIOR
1. _____	1	2	3	4	5
2. _____	1	2	3	4	5
3. _____	1	2	3	4	5
4. _____	1	2	3	4	5
5. _____	1	2	3	4	5

WORK RELATIONSHIPS

	NEEDS IMPROVEMENT		SATISFACTORY		EXCELLENT
1. Relations with other volunteers	1	2	3	4	5
2. Relations with staff	1	2	3	4	5
3. Relations with clients	1	2	3	4	5
4. Meeting commitments on hours and task deadlines	1	2	3	4	5
5. Initiative	1	2	3	4	5
6. Flexibility	1	2	3	4	5

Comments by supervisor regarding above areas:

_____

_____

Comments by volunteer regarding above areas:

_____

_____

Overall, how does the volunteer feel about remaining in this position?

_____

_____

What else can be done to support the volunteer in this position or to move the volunteer to a new position?

_____

Signed:

_____   _____
SUPERVISOR   VOLUNTEER (OPTIONAL)

_____   _____
DATE   DATE

Scheduled date of the next evaluation. _____

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The Volunteer/Staff Climate Audit

DIRECTIONS: Read each situation and decide how frequently it occurs. Check the appropriate box. Try to respond to each situation honestly. If "never" is the appropriate response, please check to the right of the last row of boxes.

Situations	usually	sometimes	rarely	never
1. "They never" or "we always" are words heard when staff refer to volunteers.	1	2	3	
2. Volunteers ask for credits or measures of their worth, (paid parking, mileage, etc.)	1	2	3	
3. Volunteers and staff both use words like "together we, our project" (meaning staff and volunteers, etc.	1	2	3	
4. Reports on volunteer activities during management meetings come from other staff, not just the person responsible for volunteer coordination.	1	2	3	
5. Volunteers are visible in leadership decision-making committees.	1	2	3	
6. Decisions affecting volunteers are made by staff without consulting the volunteers.	1	2	3	
7. Decisions affecting staff are made by volunteers without consulting the staff.	1	2	3	
8. Volunteers say "thank you" to staff publicly.	1	2	3	
9. Staff treat volunteers who serve on the Board of Directors or Advisory Committee with more respect than other volunteers.	1	2	3	
10. Projects are planned collaboratively between staff and volunteers.	1	2	3	
11. Volunteers focus on the past rather than on the future possibilities.	1	2	3	
12. Volunteers jump appropriate organizational structure lines to get answers to their questions from staff.	1	2	3	
13. Staff are too busy to explain the "rules of the game" to volunteers.	1	2	3	
14. The leaders of the organization (staff and/or volunteers) are visible at volunteer association meetings.	1	2	3	
15. Volunteers are asked to give input and assistance in most organizational projects.	1	2	3	
16. Staff say "thank you" to volunteers publicly.	1	2	3	
17. "They never" or "we always" are words heard when referring to staff.	1	2	3	

SCORING: Add the numbers in all the boxes you checked. If there are situations for which you did not check any box, add 2 points for each situation.

38-51   means you have excellent volunteer/staff relations (but don't let up!);

28-37   means you are doing some things right, but could use some tuning up in some sections (the situations can help you identify those areas);

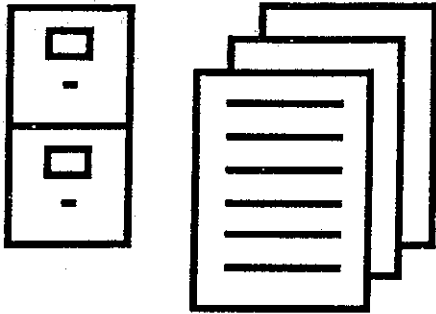36-17,   you have a serious problem and need to take action immediately.

Are you? Volunteer _____ **Staff** _____ **Other** _____ **TOTAL** _____

FOR THE RECORD:

Effective Volunteer Management Through Documentation

By Peggy A. Sissel, M.A.

When was the last time you were asked "how many volunteers do you have in your program?" It is a simple question to answer, yet it is often the only one that volunteer administrators address. Going beyond this superficial evaluation of the numbers requires some effort; therefore, some administrators of volunteer programs question the use of recording and reporting volunteer hours because "they have more important things to do."

If we evaluate this task in terms of the management function it serves, however, we discover that the information gained far outweighs the time spent in gathering it. Put simply, documentation of volunteer involvement can lead to a greater understanding of your program and of the individuals who serve within it.

Any negative attitudes you may have about record-keeping need to be addressed before you start this process. You may think that the recording of volunteer hours is too time consuming or too confusing.

Worst of all, you could discover that your program has a problem. But be positive. As we explore the value of recording and reporting volunteer hours, you will see how it can benefit not only your program but everyone involved.

There are four reasons why you need to maintain formal records of volunteer participation in your agency:
- The individual volunteer
- The volunteer program
- The organization
- The community

Let us consider each of these areas and the impact that proper documentation can have on issues of management.

The Individual Volunteer
Encouraging, evaluating and recognizing individual volunteers are a big part of a program administrator's job. Yet, it may not be possible for you to interact with each volunteer during his/her scheduled shift. Therefore, documentation of attendance is a basic, crucial function. Tardiness, absenteeism and early departures can tip you off to a

volunteer who needs more attention or assistance, and possibly a new placement.

Remember, too, that the feedback you give volunteers through the evaluation process is extremely valuable. You want to help the volunteer achieve his/her desired goals within your program, so it is important that your criteria for reviewing performance be objective and fair. A volunteer's record of hours is an excellent source of information to draw upon during evaluations, since it reflects a volunteer's level of attendance, punctuality, and any efforts that have gone beyond expectations.

Many individuals seek to gain skills and experience while volunteering and will ask you to provide a reference for future schooling or employment. The number of hours a volunteer has contributed can be an important indicator of their drive, motivation and commitment. Your written records of participation are the foundation on which to base a fair appraisal long after the volunteer has left your program.

Peggy Sissel is the director of volunteer services for the Galveston County Health District in Galveston, Texas. She holds an M.A. in Adult and Continuing Education from Michigan State University and received a B.A. in Communications at the University of Iowa. She has worked with volunteers for the past seven years on issues such as domestic violence, sexual assault and teen suicide.

Your records of a volunteer's hours can also be helpful to the individual at tax time. Although the actual hours of service donated are not tax-deductible, many non reimbursable expenses incurred while a volunteer is on duty are tax-deductible. You may be asked to supply documentation of a volunteer's time and efforts if he/she has chosen to itemize any allowable expenses.

One of the most important reasons for recording volunteer hours is that without a written record of participation, it is difficult to recognize effectively the efforts of volunteers. The number of hours, months or years of service are important markers of an individual's merit to your agency and their level of commitment to their community. This reason alone may be what has prompted past documentation of hours in your program. If so, wonderful, but use it now to your best advantage.

Some participants in your program may *require* formal record-keeping of their activities. Community restitution and probation departments mandate accurate documentation of hours, as do schools that place interns and students with your organization. This information should be considered as valuable to you and your program as it is to the individuals placed with you.

The Volunteer Program
Accurate record-keeping can give feedback and encouragement to the individual in a number of ways, but what about its use in managing the volunteer program as a whole?

Program planning, needs assessment and project evaluation are another major responsibility of a volunteer administrator's job. Like the individual volunteer, program directors also need to be encouraged and motivated while doing a job that can be wonderfully satisfying and exceptionally frustrating at the same time. Solid data that reflects the overall health of the program, including its ups and downs, can offer inspiration and motivation. At the very least, information about volunteer

> One of the most important reasons for recording volunteer hours is that without a written record of participation, it is difficult to recognize effectively the efforts of volunteers. The number of hours, months or years of service are important markers of an individual's merit.

participation can alert you to problems or concerns that need to be addressed.

What if you should discover that your program isn't as effective as you had assumed? A successful manager realizes that it is better to document the problem and plan for change and improvement than to ignore the issue and hope it goes away.

Information about the level of volunteer participation can help you set goals for your program. You may discover that you need to explore more effective methods of recruiting volunteers, or address ways of retaining them once they are in your service. You might need to develop more meaningful roles for volunteers to keep them active and interested, or expand the number of hours volunteers are asked to contribute. Your figures may indicate that you need to change your criteria for accepting volunteers, choosing only those who are ready to take their volunteer commitment seriously. Regardless of the outcome of your evaluation, recognizing your program's strengths and weaknesses is a vital part of program development.

Some volunteer administrators are required to justify their salaries and programming expenses through the documentation of volunteer participation. Even if this is not required of you, begin to do so. Regardless of the number of hours a volunteer coordinator works, there is always more that needs to be done. This is especially true if your program is growing. Use this practice of reporting successes (and efforts at improvement) as a means of supporting and promoting your program. This information is also vital when requesting increased staff or expenditures.

Documenting today's volunteer hours will help you compile that end-of-the-month report, justify your budget, plan for growth or change and help you become a more effective manager. In time, it will also enable you to chart the development of your program, which will provide an important record for your program staff, especially if you should move on to another position.

The Organization

The volunteers you coordinate belong to the entire agency for whom you work, not simply to your program. They are there to help with the specific service or function of your organization. Agency staff often do not see the volunteer program's connection to themselves, however, and thereby dismiss it as something they do not need to concern themselves with. You may have to convince them of the value of volunteers, and you can do so by providing facts about how volunteers contribute to the organization.

Your records of volunteer efforts can motivate staff to use volunteers and can facilitate good relationships with co-workers other than management. Employees unfamiliar with the benefits of volunteer programs may resent the hiring of a paid volunteer coordinator when, as they may see it, the money could be better spent if another nurse, accountant, counselor, etc. were hired. Positive staff and

volunteer relationships are critical to the success of any volunteer program.

Obviously, if a volunteer program is to be successful, ownership and interest of this program needs to be agency-wide. Therefore, you will want to "share the glory" with the staff and let them know how effective their efforts are at managing volunteers. You will also want to provide assistance (or seek assistance as the case may be) if you find that there is a problem in a particular area. Some of these issues can be discovered through analysis of your volunteer records.

For example, you may find that one department has a group of volunteers that consistently puts in additional hours, or that an office that had used four volunteers one month now has none participating. Patterns often emerge from the records that can help you take note of seasonal needs, programming changes or problems with staff and volunteer relations.

By reporting your findings to each department or supervisor, you offer them the same information and insight from which you have benefited. Ultimately, this results in promoting acceptance and understanding of the value of volunteers, which translates into more effective management at the department level. This sharing of information about your volunteer program creates a spirit of team work, camaraderie and respect. In many ways, this is the greatest success.

The knowledge of why volunteers get involved in your agency, how they are managed and the importance of their service to the organization can be used as a positive message

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A CHECKLIST FOR DOCUMENTING VOLUNTEER PARTICIPATION

☐ Do you currently keep records of volunteers' hours?

☐ Do you keep up-to-date documentation of these hours on each volunteer?

☐ Do you use a record of hours contributed as a resource for evaluation of volunteers?

☐ Do you record volunteer hours for each department or project in which volunteers are placed?

☐ Do you issue regular reports to agency administration and department supervisors about volunteer involvement?

☐ Do you use this information to evaluate management practices of each program or department?

☐ Do you use this information to evaluate the strengths and weaknesses of the volunteer program as a whole?

☐ Does your agency include reports on volunteer contributions in funding requests and grant proposals?

to everyone in the agency, as well as to the entire community.

The Community

Positive community and agency relations promote a better understanding of the need for your service and the importance of the issues you address. Whether it be prison reform, education, domestic violence, public health, the environment or historical restoration, an organization that serves the community also needs the community behind it.

One of the best ways to foster this support is by including volunteers in your services. Members of the community who are involved in providing your service will be some of your most vocal allies and some of your best proof that the agency is both responsive and effective.

As a program administrator, your leadership is also important whether you are concerned with the recruiting end of the volunteer continuum or the recognition side of this community involvement. It is your responsibility to provide feedback about the ways volunteers have helped your agency. Remember, that if it is of value to document the number of people your agency serves each year, isn't it also important to be able to see how many people served your agency?

When you recognize a great volunteer by publicly thanking him or her, you also pat the organization on its proverbial back by saying, "Look, here is a critical issue being dealt with by an important agency, which is being helped by this valuable person." And who is this person but a volunteer who gets no pay and who contributes time simply because he/she thinks it is a good thing to do. In fact, there are many more people just like

this person who believe in what you want to accomplish. So shout it from the rooftops, but be ready to prove it through documentation.

The importance of maintaining careful records of community participation cannot be underscored enough, for without these records the individual, the program and the organization could not be held accountable or be promoted adequately.

Of course, volunteer recognition helps the agency and the volunteer program, and it makes the volunteer feel good, but it also helps the community. How? By creating awareness of a problem or issue and the ways to solve it, by presenting opportunities to get involved for the civic good, and by promoting positive leadership.

Another way to envision the vital nature of record-keeping as a management tool is to think of every hour of volunteer time as a "little letter of support." In any proposal for funding, letters of support from community leaders, service providers and civic groups provide a show of support for the agency and its concerns. These letters advocate that the funding source contribute to this worthwhile effort. Every volunteer hour that you report as having been contributed to the agency increases the perceived level of community support.

A positive image in the community can go a long way towards acquiring and maintaining funding levels which will allow you to continue providing services. This is true whether your funding is service generated or comes from taxpayers and private foundations.

Regardless of the type of service your agency provides, you want it to be meaningful,

helpful and effective to those you serve. If you believe your organization contributes to the good of the community, then you want it to be the best that it can be. That means implementing sound, responsible management practices that benefit everyone in the agency and outside of it.

These are cynical times we live in, so more than ever we need to inspire, motivate and perpetuate the good in all of us and in our community. The documentation of volunteer contributions can be the good news that inspires the best in all of us.

Choosing Pre-Packaged Volunteer Data Management Software

United Way of King County

This worksheet is intended to help you analyze pre-pakaged databases. We have done some of the work for you by filling in the inforamtion for the most popular pre-packaged volunteer databases on the market. Each has their own unique characteristics and features - shop around and choose the best database for your needs.

The following list includes information taken from the websites of software developers, as well as from conversations with them. *These are provided for informative purposes only and are not an endorsement of any product.*

	Volunteer Reporter	Volunteer Works	Volgistics (Web	Volunteer
Are demonstration versions available?	Yes, on their website at no charge.	Yes, $60 for Evaluation Edition; tour is available on line at no cost.	Yes, at no charge- Sign-up for a free trial account now and start tracking volunteers in just minutes.	Online tour available or call for individual demonstration. No downloadable demonstration versions
How involved is the installation process?	Very easy - uses CD, it loads & is automatic, user merely has to click "next" at prompts; loads to C drive as default; if used in network, it loads to data folder & work stations will point to this data folder.	Very easy - uses CD with step by step instructions; for network version, installs on server & configures the program at work stations; help desk available to walk you through this if necessary.	Very easy- no software to download this is internet-based	Software based with internet interface. Not clear how easy installation process is.
What is the price of the software?	$695 for Volunteer Reporter, $500 for the optional "Touch-Screen Assistant" module.	Costs range from $794 (single-user with online support) to $1,973 (10 users with Toll-Free Support)	Varies- Depends on size of volunteer program (# volunteers tracking and archiving). Monthly fee. They have a rate calculator online.	$995 license fee includes user training, adding custom fields and importing volunteer records. An additional annual fee applies based on number of volunteers
What are the terms for receiving updates/support, and how much will they cost?	- $250 per year for support and upgrades - $300 to upgrade from an older version and receive 1 year of support and upgrades - Original purchase price includes one year of toll-free support, and the next yearly upgrade free.	Support and upgrades are included in the price of the software for the first year; several options for the type of support. After 1 year, support packages range from $99 - $349. Upgrades usually occur 1/year.	No updates necessary- online data management system. Support is included at no additional cost.	$95 – 50 volunteers per year $165 – 100 volunteers per year $225 – 150 volunteers per year Etc.
What forms of support are available?	On-line tour, training CD ($50), email, fax and toll free phone number for customer service.	On-line tour; training CD ($65); on-line searchable help topics, on-site training by request, email, fax and phone for customer service; toll or toll free call depending on level of service purchased.	Indexed and searchable help topics and online support	Not sure

Are there conversion services to get your data brought over from another system?	Free to convert from a competitor; $400 from any other program.	Free for Core Fields $250 Core Fields + Hours $500 for Complete Conversion.	Import utility provided at no charge- converts data from many popular formats. Conversion assistance offered at a nominal fee. Volunteer Works V.3 (also Redridge software) has conversion utility built in.	Not specified
PC or Mac, or both? Is the software designed for your operating system?	PC only, Windows 95 or newer.	PC only, Windows 95 or newer.	Any computer that has access to the web	PC
Can more than one person use the database at a time?	Yes, at no additional charge can be utilized in network capacity by work stations in network.	Yes, however a multiple user license must be purchased.	Yes	Yes
Is online data entry an option? This can allow volunteers to make entries from the field.	Yes, you can purchase the optional "Touch Screen Assistant" for volunteers to enter their own information.	With the purchase of Volunteer Tools package for $24 a month, volunteers can fill out timesheets online, among other functions, all over the web.	Volgistics is internet based, so online data entry is status quo	Yes
Will data automatically transfer to other relevant screens within the same record? This will reduce the need to enter repetitive data.	Yes	Yes	Yes	Yes
Is there an option for password protection?	Yes	Yes	Yes	Yes
Can the developer later reconfigure the software for your organization's changing needs?	Yes, recommendations incorporated into upgrades.	Yes, recommendations incorporated into upgrades.	Yes	Yes
What is the company's website?	www.volsoft.com	www.redridge.com	www.volgistics.com	http://www.volunteer2.com
Notes	There are some user defined fields available for other types of information that a program might track which are not included in package list; can filter information to provide specific reports.	Can customize fields for items a program needs to track that are not in package.	Volgistics is the internet based version of Red Ridges Volunteer Works.	Allows volunteers to log in and manage their profiles, schedules and report hours.

Maintaining the Manager

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One day an expert on time management was speaking to a group of business students and, to drive home a point, he used the following illustration.

As this man stood in front of a group of high-powered over-achievers he said, "Okay, time for a quiz." Then he pulled out a one-gallon, wide-mouthed mason jar and set it on a table in front of him. He produced about a dozen fist sized rocks and carefully placed them, one at a time, into the jar. When the jar was filled to the top and no more rocks would fit inside, he asked, "Is this jar full?" Everyone in the class said, "yes." Then he said, "Really?" He reached under the table and pulled out a bucket of gravel. Then he dumped some gravel in and shook the jar causing pieces of gravel to work themselves down into the spaces between the big rocks. The he smiled and asked the group once more, "Is the jar full?" By this time the class was onto him. "Probably not," one of them answered. "Good!" he replied. And he reached under the table and brought out a bucket of sand. He started dumping the sand in and it went into all the spaces left between the rocks and the gravel. Once more he asked the question, "Is this jar full?" "No!" the class shouted. Once again he said, "Good!" Then he grabbed a pitcher of water and began to pour it in until the jar was filled to the brim. Then he looked up at the class and asked, "What is the point of this illustration?" One eager beaver raised his hand and said, "No matter how full your schedule is, if you try really hard, you can always fit some more into it!" "No," the teacher replied, "that's not the point. The truth this illustration teaches us is: If you don't put the big rocks in first you'll never get them in at all."

Reflection:

What are the "big rocks" in your life?
- A project that you want to accomplish?
- Time with your loved ones?
- Your faith, your education, your finances, a cause, teaching or mentoring others?

Remember to put these BIG ROCKS in first or you'll never get them in at all. – So, tonight or in the morning when you are reflecting on this short story, ask yourself this question. What is import in my life or business? Then, put those in your jar first.

Time Management Review

United Way
United Way of King County

Instructions: For one week keep a daily log of your activities (at the end of each half hour, right down the activity completed for that time period). At the end of each date, review time log and rate each activity (on a scale of 1 to 5, 5 being the most important). At the end of the week, review the log results to determine how much time was devoted to highly important tasks versus low-priority tasks.

Date	Activity	Start	End	Comments	Rating

Time Management

"Time is life. It is irreversible and irreplaceable. To waste your time is to waste your life, but to master your time is to master your life and make the most of it."

Alan Lakein

10 Reasons Why People Don't Get Things Done
1. Working without a daily plan
2. Working on low priority items while high priority items are deferred
3. Trying to do "everything" (aversion to asking for help)
4. Not distinguishing between urgent and important
5. Interruptions (failure to control)
   - Telephone interruptions
   - Drop-in visitors
   - Self originated
6. Doing things that are a low priority because they are easier
7. Great difficulty in, or fear of saying "no"
8. Personal inefficiency
   - Habits
   - Not thinking ahead
   - Wasting time
9. Working without a long-range plan
10. Spending more time getting organized and making lists than doing the actual work that you're trying to organize. Time management should help, not hinder

Guidelines to Improve the Management of Your Time
- Find out where your time goes. Watch yourself closely for a few days and identify your "time wasters"

- Eliminate your "time wasters"

- Decide where your time should go - set goals and establish priorities

4

- If you are working on something that needs your utmost attention, don't be afraid to ask your co-workers or support person to take messages for you - use this sparingly

Outgoing
- Keep a list of the things that you need to cover with someone instead of calling three or four times
- Have a written agenda for multi-topic calls
- Consolidate calls into a specific period
- Leave accurate messages and times available to call back
- When leaving messages on any type of answering machine, always be sure that you state who you are, who you're with and the date and time of your call. Also, be sure to speak slowly, clearly and concisely

Meetings
- Meetings can be very productive and at the same time, if poorly planned or unnecessarily called, can be one of the greatest time wasters. The bottom line, an effective meeting is one that accomplishes it's purpose within the minimum appropriate time.

Meetings You Call
- Be certain your purpose is well defined and that you know what results you expect to achieve
- Write out an agenda which will achieve the desired results. Include the start and finish times, topics for discussion, the meeting's objectives and subjects for participants to consider prior to the meeting
- Carefully consider who should attend meetings and distribute agenda before meeting

Meetings You Participate In
- Prepare in advance, be ready with the materials you need and be on time
- Make comments that are relevant to the objectives of the group. Do not use the time of the meeting's participants to get information unique to your own requirements. Handle this one on one later.

Handle Mail/In-Box Effectively
- Handle each piece of paper only once
- If something can't be handled immediately, do something to move it ahead
- Make a note of what's needed and file it for appropriate follow-up
- Place reading and low priorities not being worked on out of sight, either in your briefcase or file

Other
- When it doubt, throw it out
- Use customized form letters
- Use telephone instead of writing where possible
- Hand write responses on original document when appropriate

Interruptions
- Interruptions are a part of the job and cannot be eliminated. However effective, time management requires that we implement a strategy to reduce the number of interruptions and the duration of each

Drop In Visitors
- "Have a minute?" - Does not require a "yes" response. It is okay to say, "No, not really" and set up a time that is mutually convenient
- Reduce unneeded socializing - have fund in your job, but remember why it is you are there
- Don't drop in on others without asking, "Is this a good time for you?" or "Do you have a second?" and be sure you are concise and don't waste their time

Telephone
- Telephones represent a significant part of time every day and therefore represent one of the greatest opportunities to save time. Knowing the "who, when, how many, about what" is an important start.

Incoming
- Always stop what you are doing and answer the phone with a clear head

5

- Make a daily "TO DO" list - assign priorities "A, B, or C"
  - "A" Priority: Must do. Critical to successful performance. Important and urgent
  - "B" Priority: Should do. Critical to successful performance. Important but not urgent
  - "C" Priority: Nice to do. Desirable but not critical to successful performance. Sometimes urgent but not important

- Limit yourself to the number of "A's" you allow yourself to assign

- Reassign priorities only if changing conditions justify change

- Don't slip into the easy habit of taking care of easy "C's" instead of tougher "A's"

- Spend 10 minutes every day planning your list of activities for that day

- Develop these based on your longer term plan

- Keep your daily "TO DO" list in front of you at all times. Stay on track

- Don't procrastinate. Break projects down into manageable units, set a deadline, take action, do it first, reward yourself. Remember it takes greater force and energy to start a project than it does to work on the project. It is the beginning, the decision to act, that's difficult.

- Block out larger chunks of uninterrupted time for "important" complex activities. An uninterrupted hour is equivalent to three or four with normal interruptions

Organization
You can improve your time management effectiveness considerably by asserting an appropriate level of control in the ways you are organized.

Organize Your Work Station
- Design a simple filing system (major topics/not too specific)
- Work on one project at a time - don't get sidetracked
- Keep all phone messages in one secure place
- Piles do not equal organized. If you aren't working on it right now, file it

Planning for Those Too Busy to Plan

By Heather Berthoud & Bob Greene

The computer system is down, a senior staff person just gave notice, you need to write a speech for this week's fundraising dinner, and the board wants you to take on a brand-new project. With all this on your plate, how can you meet your responsibility as a leader to bridge the here-and-now, daily details and the future success of the organization?

As you put out fires, planning can feel like a luxury. But being too busy to plan is like running alongside your bicycle because you're too busy to get on. We suggest reframing the situation from "I don't have time to plan" to "these constant crises makes planning the top priority."

As consultants, we often hear: "we tried planning before, and it didn't help." Unfortunately planning is often confused with wishful thinking, lofty mission statements, and long to-do lists disconnected from environmental trends or organizational resources. Instead, planning should identify strategic responses to a changing environment and establish doable, measurable action steps.

Consider one source of crises: fund raising. Many nonprofits are stuck in a vicious cycle raising funds from one event to another. Fund raising is often characterized by random good ideas ("I know, let's have an auction!") and responses to unexpected requests for proposals that are due next week. Strategic planning, because it clarifies where the organization is going, can undergird comprehensive fund raising that secures long-term commitments and significant grants and donations.

Without effective planning, organizational endeavors are haphazard activities rather than coordinated, strategically directed programs. For example, publicity and media work may depend on luck rather than a proactive effort to inform the world of the organization. Membership development can consist of sporadic recruitment campaigns that don't necessarily retain members long-term. Individuals and departments may believe they are too busy to collaborate and build synergy. Publicity, membership development, team building, and other organizational work best move an organization forward if they are driven by a comprehensive strategic vision of where the organization is going and how it will get there.

Getting on the Bicycle

Given constant deadlines, how do you stop running beside the bicycle and start steering? A common response is,

"better time management." For time management to be effective, however, it must be based on a solid foundation of planning. As Diagram 1 illustrates, time management depends on setting priorities derived from strategic and operational plans that are grounded by organizational vision and values. Finding better ways to check-off to-do items still begs the questions, "are these to-do items truly important?" and, "where are these activities leading us?"

Diagram 1

Planning is about establishing priorities. Ideally, long-term priorities inform the medium- and short-term. But sometimes you need to get out of the immediate whirlwind before you can think long-term. Here are a variety of recommendations, starting with short-term time-management ideas and moving to longer-range planning suggestions.

Suggestions for the short-term:

1. Time-management techniques may be valuable immediately and help buy the necessary time for more comprehensive planning. The first step is to separate the *important* from the *urgent*. Steven Covey, in *The Seven Habits of Highly Effective People*, explains that what is urgent–an immanent deadline–may not necessarily be important–what is in the long-run best interest of the organization (such as developing a comprehensive fund raising plan or researching the need for a new program). Make a list of all of the tasks, large and small, that are keeping you so busy. Now mark each as being either urgent, important, or urgent and important. (Go ahead and cross out now those tasks that are neither urgent nor important.) The next challenge is to reduce the number of urgent tasks to concentrate more on what's most important.

2. Making time for what is most important is a leadership team effort. Work together with the board president and/or senior staff to make sure that
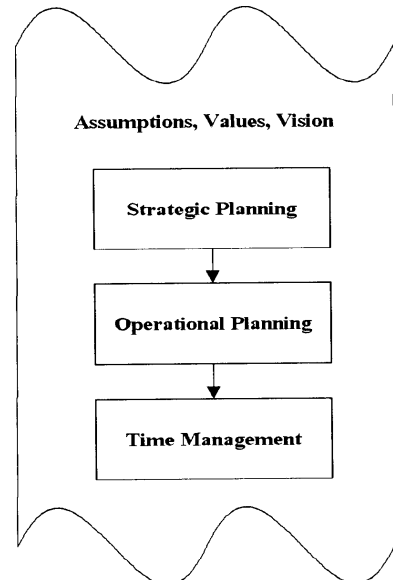
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everyone's immediate-term efforts are prioritized appropriately.

3.   As part of the leadership team discussions, compare priorities versus resources. Do you have the human, financial, and material resources to realistically accomplish your priorities? If getting through each day depends on superhuman efforts (the nonprofit "Superhero Syndrome") then your organization is in a danger-zone. An organization strung out nearly to the breaking point will be hard-pressed to innovate and will likely face high turnover and poor staff morale. The leadership team may need to conduct "emergency room triage" by putting some activities on hold and directing everyone's limited energies to one or more critical projects.

4.   Starting today, take 15 minutes to reflect on what you've learned and to celebrate what you've accomplished in the last twenty-four hours. Do this every single day, and increase the amount of time spent reflecting and celebrating. When you are caught up in a blizzard of activity, it is easy to forget to reflect and learn from your experiences and show appreciation to all those superheroes.

> *But being too busy to plan is like running alongside your bicycle because you're too busy to get on.*

Suggestions for the medium-term:
1.   Move from reflecting on one day at a time to reflecting on the last week, month, or quarter. Based on the determination of what your human and material resources can realistically accomplish, identify the efforts that will be most beneficial for the organization to focus on during the next 6–12 months.

2.   Then create an operational plan to implement the agreed-to priorities. Identify and chart the activities, resources needed, responsible individuals, budget, timelines, etc. Everyone's daily to-do lists should clearly flow from the operational plan.

3.   Bring staff from various functions and departments together to discuss how they can coordinate implementation of the operational plan. If staff complain they don't have time to collaborate, *make that the main topic of discussion*–this will raise many issues that are blocking success!

Suggestions for the longer term:
1.   Engage in strategic planning when you and your team effectively implement programs but wonder what all the programs amount to—the organization's future direction may be called into question because of falling membership, demographic or other community changes, increased competition from other organizations, or just the nagging feeling that you are stuck in a rut. There are numerous models and approaches to planning; the process should be tailored to a particular organization's needs. Key elements of an effective strategic planning process include:

- Clarifying organizational assumptions, values, vision, and beliefs that undergird the organization's work.
- Gathering objective, high quality data from a wide range of the organization's stakeholders. (In contrast, organizational decisions are often based on gut impressions, speculation, or the suggestions of a vocal few.)
- Using the data gathered to analyze internal strengths and weaknesses and external threats and opportunities affecting the organization.
- Developing goals and options for achieving them.

2.   Once you have a strategic plan, use it to make programmatic decisions and assess progress through periodic board review. Ensure that operational plans are based on the strategic plan, and daily to-do lists flow from the operational plan. The strategic plan, therefore, is a tool to help align everyone's efforts.

3.   On an annual basis review the strategic plan itself and, especially, the underlying assumptions. Test whether what you assumed would happen actually occurred and consider whether the plan needs to be adjusted.

Conclusion
If you are too busy to engage in planning now, short- and medium-term fixes may be necessary. Recognize, though, that sometimes the *busy-ness* is a result of taking on too many disconnected tasks because "they seem like good ideas" and not because they are driven by a plan for the future.

Our experience shows that those organizations that grow and serve their communities long-term operate with a clear vision connected to daily realties. This does not involve pie-in-the-sky dreaming. It requires focusing efforts in a proactive and strategic manner—getting on the bike and steering, rather than trying to run alongside it.

Heather Berthoud and Bob Greene are organizational development consultants with over 30 years combined experience in nonprofit organizations at the local, state, and national levels. Their areas of expertise include: strategic planning; leadership and board development; diversity/inclusion; teams; and conflict resolution. .

Reprinted from WCA Nonprofit Agenda *July 1999*

(c) Heather Berthoud & Bob Greene

Volunteer Manager Assessment

The Volunteer Management Competencies were created to document the skills you need to function as a volunteer manager. The *Quick Assessment* enables you to identify and rate yourself according to your perceptions of your strengths and needs.

Managing People:

Function	Basic Knowledge	Mid-Level Knowledge	Confident & Capable
Identify the need for volunteers in the agency: know agency priorities, plans, customer/client needs and describe how volunteers will add value. Recognize and advocate for a designated manger/supervisor	○	○	○
Recruit Volunteers: Use creative marketing and communication skills to identify targets, articulate opportunities and provoke response	○	○	○
Select & place volunteers: Effectively use interviewing skills to elicit competencies. Use assessment skills to determine qualifications and suitability of applicant to assignment	○	○	○
Orient volunteers and staff: Deliver effective training for volunteer and staff and include development opportunities for volunteers that require additional skills knowledge and ability to perform service.	○	○	○
Develop performance measurement system: Link and document individual needs with organizational priorities, strategies and operations. Use adult/ youth development principles when supervising, training and providing advancement opportunities for volunteers.	○	○	○
Assess & provide feedback to volunteer about performance: Establish a system and keep a schedule of performance measures for volunteers. Identify and articulate performance expectations of volunteers, target outcomes and output indicators and give both positive and negative feedback as necessary	○	○	○

Excerpted from Volunteer Maine: http://www.volunteermaine.org/volcomps/ManagingPeople/people-assess-3.html#Link212801Context

Function	Basic Knowledge	Mid-Level Knowledge	Confident & Capable
Recognize, reward & retain volunteers: Maintain communication and feedback loop with frequent and public acknowledgement as well as a detailed quantifiable and concrete reports of accomplishments	○	○	○

Managing Projects:

Function	Basic Knowledge	Mid-Level Knowledge	Confident & Capable
Manage or oversee projects: Plan, Document, implement, evaluate, train, and disseminate reports on work	○	○	○
Develop & manage financial processes: Identify and obtain alternative sources of funding; develop and manage budget accounts for both cash and in-kind resources; pursue fiscal sustaibality	○	○	○
Manage technology: Identify, obtain and apply technology that is useful for recruitment, placement, training, record keeping, finance, evaluation, analysis and service delivery	○	○	○
Manage risk: Apply knowledge of risk assessment, prevention, identification and financing to risk avoidance. Address tasks, individuals, environment, organization and laws or regulations	○	○	○
Develop & maintain record keeping & documentation system: Understand relationship between maintaining sufficient documentation and managing risk. Use documentation system for supervising volunteers and tracking program impact/ evaluation that is efficient, comprehensive and cost effective	○	○	○
Manage quality: Apply principles of continuous quality improvement and quality assurance to ensure volunteer services are responsive, consistent, valued and of high quality	○	○	○

Excerpted from Volunteer Maine: http://www.volunteermaine.org/volcomps/ManagingPeople/people-assess-3.html#Link212801Context

Function	Basic Knowledge	Mid-Level Knowledge	Confident & Capable
Develop & revise policies, processes & procedures as needed: Ensure that guidelines for program operations, volunteer assignments and program staff reflect best practices of both volunteer administration and service sector. Integrate change in service sector into volunteer roles, training, etc.	○	○	○

Leading Organizations

Function	Basic Knowledge	Mid-Level Knowledge	Confident & Capable
Articulate & commit to the organization's vision and connects vision to goals: Hold a systems perspective, an awareness of community context, and strategies outlook.	○	○	○
Partner, collaborate, work with others and facilitate work groups: Build coalitions, share leadership and resources; and establish strategic alliances with mutual organizational benefits	○	○	○
Empower others: Share power and give up control; promote policies that promote cultural competency and disability inclusion. See mutual benefits from empowerment.	○	○	○
Convert needs into objectives & action plans: implement planning tasks and balance with details of accomplishing work. Articulate connections, opportunities and advantages for internal and external partners and program participants.	○	○	○
Learn, apply and model the professional principles of volunteer management: Initiate a self assessment plan for professional development. Make opportunities for formal and informal learning and support the advancement of the field of volunteer management.	○	○	○

Excerpted from Volunteer Maine: http://www.volunteermaine.org/volcomps/ManagingPeople/people-assess-3.html#Link212801Context

There is a *Novice to Expert Continuum for Human Resources and Supervision,* a *Novice to Expert Continuum for Leadership*, and a *Novice to Expert Continuum for Management and Operations,* which each take longer to complete (7 pages in length).

Resources

TABLE OF CONTENTS

On-Line Resources for Volunteer Program Managers

Volunteer Program Resources:

The Points of Light Foundation
http://www.pointsoflight.org/
The Points of Light Foundation & Volunteer Center National Network engages and mobilizes millions of volunteers who are helping to solve serious social problems in thousands of communities. Through a variety of programs and services, the Foundation encourages people from all walks of life — businesses, nonprofits, faith-based organizations, low-income communities, families, youth, and older adults — to volunteer.

The Volunteer Center National Network
http://www.pointsoflight.org/centers/
The Points of Light Foundation works in partnership with the Volunteer Center National Network (VCNN) to help mobilize people and resources to find creative solutions to community problems. Volunteer Centers are conveners for the community, catalysts for social action and key local resources for volunteer involvement.

United Way of King County
http://www.uwkc.org
Mission
United Way of King County mobilizes our community in ways that no single agency, individual, or government can to enhance the ability of people to care for one another.
http://www.uwkc.org/nonprofit/resources.asp
local non-profit resources and trainings

Volunteer Administrators Network Northwest
http://www.vannw.org/mc/page.do
Your Regional Volunteer Development Connection! Check out this site for local networking opportunities. VAN Northwest was formerly DOVIA of King County.

Volunteer Resource.Org
www.volunteerresource.org
A comprehensive library of resources and effective practices on volunteering and volunteer management

Corporation for National & Community Service Resource Center
http://www.nationalserviceresources.org/utility/who_we_are/
The Resource Center is your one-stop shop for online tools and training resources to strengthen your volunteer or service program.

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ServiceLeader.org
www.serviceleader.org
Information and resources on volunteerism

Council for Certification in Volunteer Administration
http://www.cvacert.org/
Certified in Volunteer Administration (CVA) is the only international professional certification in the field of volunteer resources management. Originally developed by the Association for Volunteer Administration (AVA) several decades ago, the program is now sponsored by the Council for Certification in Volunteer Administration (CCVA).

Independent Sector
http://www.independentsector.org/about/about-is.htm
INDEPENDENT SECTOR is committed to strengthening, empowering, and partnering with nonprofit and philanthropic organizations in their work on behalf of the public good. Its membership of nonprofit organizations, foundations, and corporate philanthropy programs collectively represents tens of thousands of charitable groups serving every cause in every region of the country, as well as millions of donors and volunteers.

Merrill Associates
http://www.merrillassociates.com/
Strengthening leaders, organizations and communities
TONS of links to internet resources and information on volunteer management. The best site ever, bookmark her site now!

Energize!
http://www.energizeinc.com/
Energize, Inc. is an international training, consulting and publishing firm specializing in volunteerism. If these words are in your vocabulary--*community service, membership development, auxiliary, community organizing, service-learning, lay ministry, pro bono work, supporter, friends group, political activist, service club*-- we can help!!

Volunteer Today
http://www.volunteertoday.com/
Volunteer Today is an e-newsletter for those who manage the work of volunteers in nonprofit, government or corporate programs. Its aim is two-fold: 1) build the capacity of individuals to organize effective volunteer programs; 2) enhance the profession of volunteer management.

Online Volunteer Search Engines:

United Way of King County
http://www.volunteersolutions.org/uwkc/agency/

 VolunteerMatch
http://www.volunteermatch.org/

Idealist.org
www.idealist.org

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Craigslist.org
www.craigslist.org

1-800-Volunteer.org
http://www.1-800-volunteer.org/1800Vol/OpenIndexAction.do

Nonprofit Resources:

Nonprofit Risk Management Center
http://www.nonprofitrisk.org/
Tools and advice for risk management

Non-profit Assistance Center
http://www.nacseattle.org/
The Center helps groups to enhance their internal capacities by providing culturally competent training and mentoring for organizations' staffs and leaders

Charity Channel
www.charitychannel.com
Many volunteer management resources

Iknow.org
www.iknow.org
Empowering Nonprofit Leaders to Bring Their Vision into Reality. All types of information for non-profits

PNN Online
http://www.pnnonline.org/modules.php?op=modload&name=News&file=index
the non-profit news and information resource - delivers news, information, and resources to all segments of the nonprofit world in order to help them better achieve their goals.

CSR Wire
http://www.csrwire.com/
The leading source of corporate responsibility and sustainability, press releases, reports and news.

boardnet*USA*
http://www.boardnetusa.org/public/home.asp
The unique website revolutionizing the way nonprofit boards and new leaders find each other.

Npower
http://www.npowerseattle.org/
NPower Seattle's mission is to help Puget Sound nonprofits use technology to better serve their communities

Other Useful Online Resources:

Survey Monkey
www.surveymonkey.com

Website to build surveys/evaluations. Basic memebership is free.

Mission Fish
http://www.missionfish.org/
Support your favorite causes through trading on E-bay.

About Energize and Our Website

What Is Energize?
Energize, Inc. is an international training, consulting and publishing firm specializing in volunteerism. If these words are in your vocabulary--*community service, membership development, auxiliary, community organizing, service-learning, lay ministry, pro bono work, supporter, friends group, political activist, service club*-- we can help!! Founded in 1977, Energize has assisted organizations of all types with their volunteer efforts-- whether they are health and human service organizations, cultural arts groups, professional associations, or schools.

- Consulting and Training
- Publishing
- Volunteer Management Staff Development - ***Everyone Ready***®
  (This program is for national organizations or organizations that feel they are large enough or have a sufficient number of learners for ***Everyone Ready*** to be cost-effective.)
- About the President, Susan J. Ellis

How this Website Connects You to the World of Volunteerism
Energize has been on the Web since 1997. At that time, we saw a strong need to connect leaders of volunteers with resources, information and ideas generated from around the world. We want this to be a place where leaders of volunteers come:

- to exchange views on critical issues in the field,
- browse pertinent articles and purchase quality books on volunteer management,
- gather information on how to broaden their professional skills and networks,
- advance their careers and
- link to other sites useful to volunteer managers.

We want your feedback!
We want this site to provide the most current and vital information in the field. Throughout the site, we have forms you can complete to provide us information on a range of topics including conferences, classes, DOVIAs, your volunteer recognition ideas, etc. We also want to hear your opinions on Susan's hot topic of the month, our books, and even the website itself. Complete the forms and submit them to us. We do want to hear from you! Contact us now

Who is the Website Manager and How Do I Contact Her?
Kristin Floyd is the Website Manager and is always interested in hearing your opinions (good or bad!) about the site. She's particularly interested in knowing if you're having any trouble viewing parts of the site or if you have ideas to improve the design or content of the site. All suggestions will be considered! Contact us

Why We Are a For-Profit Company
This question arises periodically, so here is what Susan Ellis has to say:

I could have opted to make Energize a nonprofit organization, recruit a volunteer board of directors, raise funds, and put myself on salary. Instead, I had a conscious, philosophical reason for taking the for-profit route. I have watched too many nonprofits convince third-party funders of the value of their services, while those who actually receive the services are dubious of their worth. Since funders rarely ask the end users what they think, grants continue to be awarded mainly on the skills of the organization's proposal writers. The only way that I could be certain that my clients valued Energize's services was to establish a direct, customer relationship with them. Many of our customers pay for our training, books, and other help with money they, in turn, get from donors. But the customer decides how to spend that money. If they choose Energize, I feel that is a true endorsement. And that's why I'm proud to have lasted in business for going on 30 years.

Recognition
Energize has received praise for its services from many sources and maintains a file of testimonial comments from clients and colleagues. Occasionally we are honored in a special way. Two examples are this letter from Project Linus NJ and the BetterWorldHeroes Web site, which has included Susan on their calendar of "heroes" for December 5 (International Volunteer Day).

Stay in Touch!

12/27/06

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Online Periodicals on Volunteerism

by Steve McCurley

In this edition of *Along the Web,* we look at online periodicals that focus on volunteerism – magazine, newsletters, mailing lists, etc. While the Internet has developed some new ways of distributing information (such as the PDF file we usually highlight), many of the older materials which we traditionally distributed via mail are being distributed on the Internet as well.

One advantage to this method is that you can access current issues and previous ones, too. Also, the majority of the resources listed here are free for the download – certainly a benefit that's hard to offer in print-and-mail format.

For this review, we'll organize things into:

- Opinions and Blogs
- Magazines
- Newsletters
- Paid Subscription Required

Opinions and Blogs

Susan Ellis Hot Topics
Energize, Inc.
www.energizeinc.com/hot.html
While not officially a "Blog," Susan Ellis' monthly Hot Topics is by far the most sustained and interesting discussion of issues around volunteering to have ever appeared. After looking at the list of her topics over nine years, you'll understand why writing a regular column is the hardest job in reporting – where do all these ideas come from? What makes it more phenomenal is that Ellis also does this for the *NonProfit Times* and *e-Volunteerism.*

Jayne Blog
Jayne Cravens, Coyote Communications
blogs.forumer.com/jcravens/
Jayne Cravens, otherwise well known as the "Mother of Online Volunteering," writes a regular blog on her life, travels and opinions. It is a really good place to keep abreast of technological developments that might be utilized in volunteer management. If you read it and make comments, please request more coverage of her dogs.

Australasian Hot Topics

Andy Fryar, OZVPM
www.ozvpm.com/hottopics.php
The (mostly) Australian complement to Ellis' Hot Topics. Andy Fryar is notable for having an interesting perspective on things – who else would speculate on whether suicide bombers qualify as "volunteers"?

Mary Merrill, Topic of the Month
Merrill Associates
www.merrillassociates.com
This, like Ellis' Hot Topics, is a blog of ideas and opinions, in this case the late Mary Merrill's comments on a wide range of issues. More than 70 thoughtful and useful articles.

Mark Restall, Volunteering Blog
Volunteering England
www.volunteeringengland.blogspot.com/
Another real blog, this one by Mark Restall, the information specialist at Volunteering England. In marked contrast to the flawlessly factual responses that Restall gives to information requests, this blog is deliberately and delightfully opinionated.

Magazines

The Journal of Extension
www.joe.org
JOE, as it is traditionally known, is probably the oldest and least generally known of all journals covering volunteering. JOE was created for the Extension Programs in the U.S. and has always had a sizeable portion of articles on volunteer involvement (although the rest of the articles can cover practically anything). You can read articles online back to 1963.

Volunteer Today
Nancy Macduff
www.volunteertoday.com
It's hard to tell whether *Volunteer Today* ought to be called a Web site, a newsletter or a magazine. It has lots of different things in different formats, so we're throwing it into the magazine category just for the diversity.

Volunteer Management Review
www.charitychannel.com/enewsletters/vmr/
VMR is officially described as an 'e-newsletter' but I think it is more substantive than that. Originally created by Nan Hawthorne, it is now written by a rotating group of contributors on a periodic basis.

Newsletters (an arbitrary selection)

The Voice of Volunteering
Centre for Volunteering, Volunteering New South Wales, Australia
www.volunteering.com.au/latest_news/voice_of_volunteering/index.asp

Global Volunteer Update
World Volunteer Web, United Nations Volunteers
www.worldvolunteerweb.org/news-views/newsletters.html

Volunteering New Zealand Newsletter
www.volunteeringnz.org.nz/news/newsletter.php

V-Link
Volunteer Victoria, Australia
www.volunteervictoria.bc.ca/news_newsletter.html

Employees Volunteering Newsletter
Kenan Institute Asia
www.kiasia.org/EN/
Group_Tier2.asp?GroupTierId=12&SubGroupTier_ID=191

e-Newsletter on Volunteering
International Federation of Red Cross and Red Crescent Societies
www.crvoluntariado.org/portal/
page?_pageid=478,12237547&_dad=portal30&_schema=PORTAL30

Volunteer Voice
Volunteer Center of Rhode Island, US
www.vcri.org/matriarch/
MultiPiecePage.asp_Q_PageID_E_34_A_PageName_E_eventsnews

Paid Subscription Required
This last set usually requires that you subscribe or become a member. On the other hand, once you join, they also have the advantage that you can actually read all past issues of the magazine, one heck of a bargain.

e-Volunteerism: *The Electronic Journal of the Volunteer Community*
www.e-volunteerism.com
Actually the first to launch online.

International Journal of Volunteer Administration
www.ijova.org
Previously the official publication of the defunct Association for Volunteer Administration, IJOVA now operates out of North Carolina State University. It has transitioned to publication on the Web, and the latest issues have been really quite good and wide-ranging. The first year (2007) of issues was provided free of charge and is still available online. But, as of 2008, this is a paid subscription publication.

Non-profit and Voluntary Sector Quarterly
Association for Research on Non-profit Organizations and Voluntary Action
www.arnova.org
Archived articles can be obtained for a fee at http://nvs.sagepub.com/.

Voluntary Action
Institute for Volunteering Research, UK
www.voluntaryaction.ivr.org.uk/

Volunteering: The Magazine
Volunteering England
www.volunteering.org.uk/News/Volunteering+Magazine/

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Steve McCurley is an internationally-known trainer and speaker in the field of effective volunteer involvement. He is currently a partner in VM Systems, a management consulting firm specializing in helping organizations improve their utilization of volunteers.

He has served as a consultant on volunteer program development to the American Association of Retired Persons, the National Association of Partners in Education, the US Tennis Association, Special Olympics International, the National Park Service, the Points of Light Foundation and other groups. He is a member of the national board of Women in Community Service, the board of the Volunteer Center of Olympia, WA, and is on the Advisory Board for the Virtual Volunteering Project of the University of Texas. In collaboration with Susan Ellis, he is the co-founder of *e-Volunteerism*.

Each year he gives workshops to over 10,000 participants from groups as diverse as the American Hospital Association, the Fraternal Congress of America, the Nature Conservancy, and Samsung, Inc. He is the author of 14 books and more than 120 articles on volunteer involvement, including the best-selling basic text, *Volunteer Management.*

On the international front, Steve has done work in Canada, England, the Caribbean, and South America. His writings have been translated into Spanish, Portuguese, Russian, Ukrainian, Rumanian, Hebrew, Chinese and Korean, among other languages.

His email address is steve@e-volunteerism.com

The Corporation for National and Community Service Resource Center

United Way of King County

About The Resource Center

The Resource Center is your one-stop shop for online tools and training resources to strengthen your volunteer or service program. Sponsored by the Corporation for National and Community Service and administered by ETR Associates, The Resource

Center is the central point for:

- Sharing training and technical assistance information among the Corporation's three main programs—Senior Corps, AmeriCorps, and Learn and Serve America programs
- Sharing information with potential grantees to help them apply for Corporation resources
- Providing technical assistance to any organization using volunteers to strengthen local communities

The Resource Center contains online training tools, event calendars, and effective practices, as well as a catalogue of printed publications and videos available on loan.

The Resource Center's content is generated by a network of more than 20 training and technical assistance providers funded by the Corporation to serve the needs of volunteer and service programs.

In addition, the Resource Center serves as a learning exchange where individual programs can share their innovations and effective practices with others.

The Corporation for National and Community Service provides opportunities for Americans of all ages and backgrounds to serve their communities and country through three programs:

1. Senior Corps
2. AmeriCorps
3. Learn and Serve America.

Members and volunteers serve with national and community nonprofit organizations, faith-based groups, schools, and local agencies to help meet community needs in education, the environment, public safety, homeland security, and other critical areas.

The Corporation is part of USA Freedom Corps, a White House initiative to foster a culture of citizenship, service, and responsibility, and help all Americans answer the President's Call to Service.

Website: http://nationalserviceresources.org/

Member Benefits

The Volunteer Administrators Network serves your professional needs through:

- **Professional Development**
  - o Annual Conference
  - o Brown Bag Workshops
  - o Mentorship program

- **Networking Opportunities**
  - o Social and professional events

- **Leadership Opportunities**
  - o Become a board member
  - o Join a committee
  - o Share your knowledge with others- become a mentor

- **Providing Connections to Resources**
  - o Job postings
  - o Educational opportunities

Join VAN today! Visit www.vannw.org

For more details, call 1(800) 430-6494

Vision:

Volunteer management professionals effectively engaging volunteers for impact in their communities

Mission:

VAN is a vibrant professional network that advocates for the profession and empowers Volunteer Managers.