

The Essentials: Excellence in Volunteer Management

presented by:



Hands On
NETWORK

GENERATED BY
POINTS OF LIGHT
INSTITUTE





ELEMENTS OF A VOLUNTEER PROGRAM

Where do I start? There are many elements of a volunteer program and many different roles volunteer managers play. Does your volunteer program have all these elements? Many of these tasks are ongoing or overlapping.

Planning

- Conduct organizational needs assessment
- Develop volunteer program purpose statement
- Evaluate risk and create a risk management plan
- Create budget/ secure resources for volunteer program
- Identify appropriate positions and develop volunteer position descriptions
- Develop policies/procedures
- Create agency/volunteer agreement
- Train staff to work with volunteers
- Create volunteer application
- Develop outreach and marketing materials

Recruiting and Placing

- Create a recruitment plan
- Recruit volunteers
- Review application
- Screen volunteers
- Run background checks
- Check references
- Sign agency/volunteer agreement
- Place volunteers in positions

Orientation and Training

- Orient volunteers
- Train volunteers

Supervision and Recognition

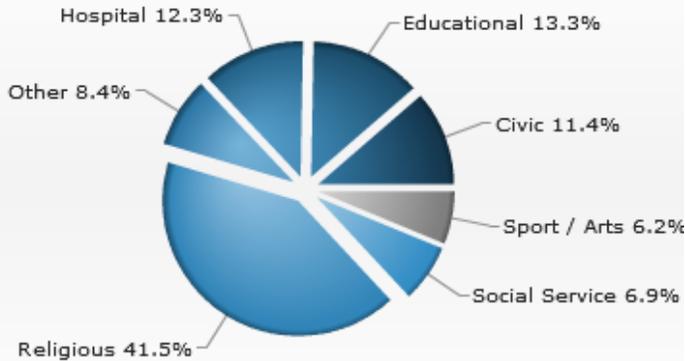
- Supervise volunteers
- Recognize volunteers

Evaluation

- Conduct agency/volunteer evaluation

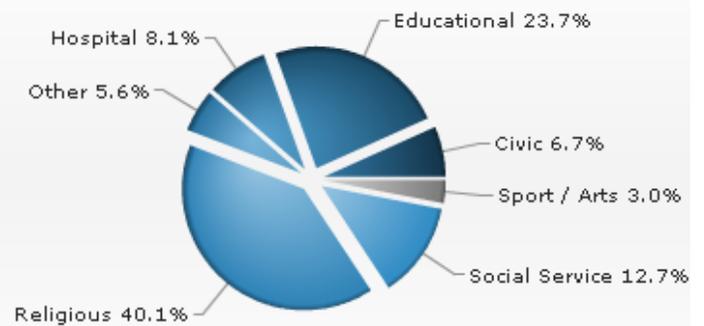


Where People Volunteer (1989)



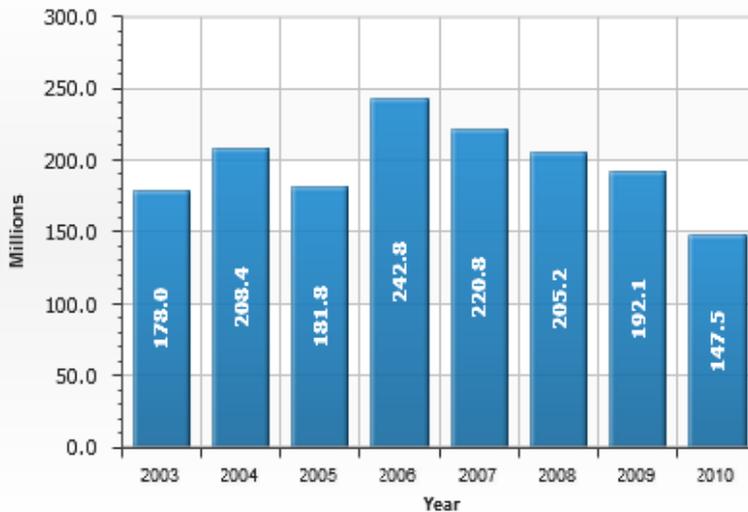
Numbers in the chart may not add up to 100% because of rounding

Where People Volunteer (2008 to 2010)

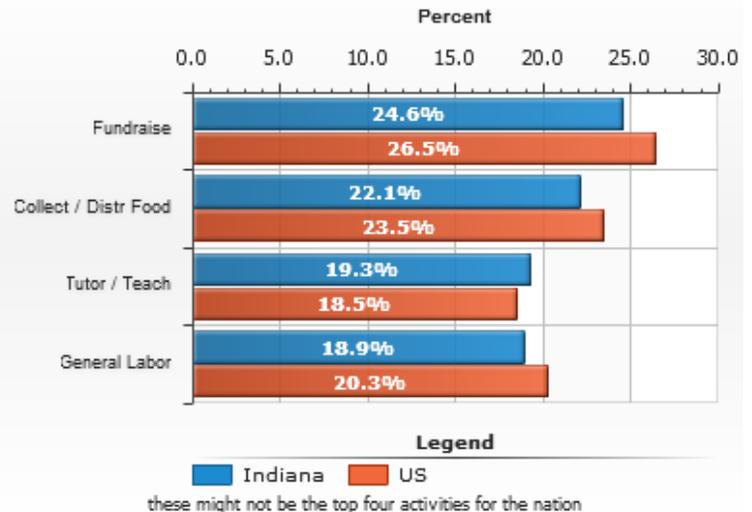


Numbers in the chart don't add up to 100% because of rounding

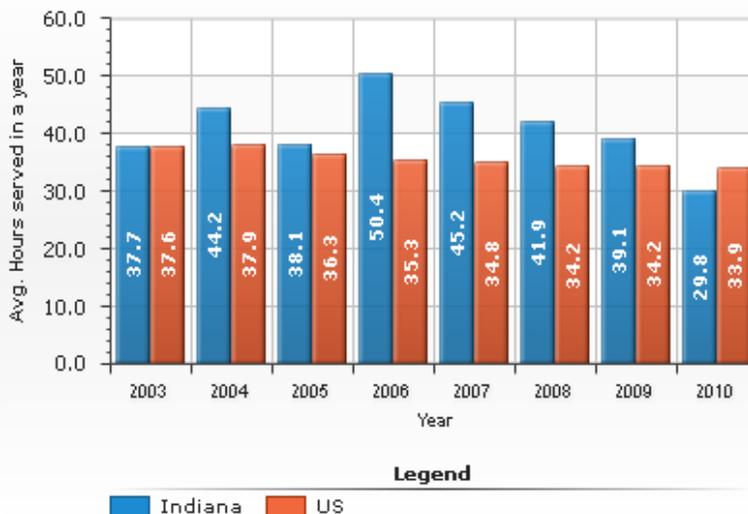
Total Volunteer Hours



Top Four Activities (2008-2010)



Volunteer Hours Per Resident



Trends and Highlights

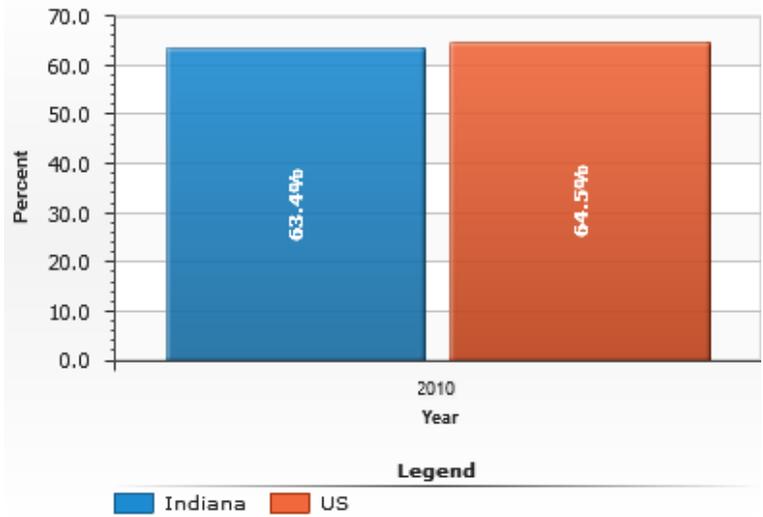
Based on single year data (2010)

- 1,294,468 Indiana residents volunteered 147.5 million hours of service through or for a nonprofit or community organization in 2010.
- Service also takes place informally when people work with neighbors to address or fix a community issue. In 2010, 6.5 percent of Indiana residents volunteered informally, totaling approximately 323,459 individuals.
- In Indiana, more than 34,000 people participate in national service each year through 970 national service projects and programs. This year, the Corporation for National and Community Service (CNCS) will commit more than \$13,500,000 to support the national service initiatives (Senior Corps, AmeriCorps, Learn and Serve America, and other programs) in Indiana.

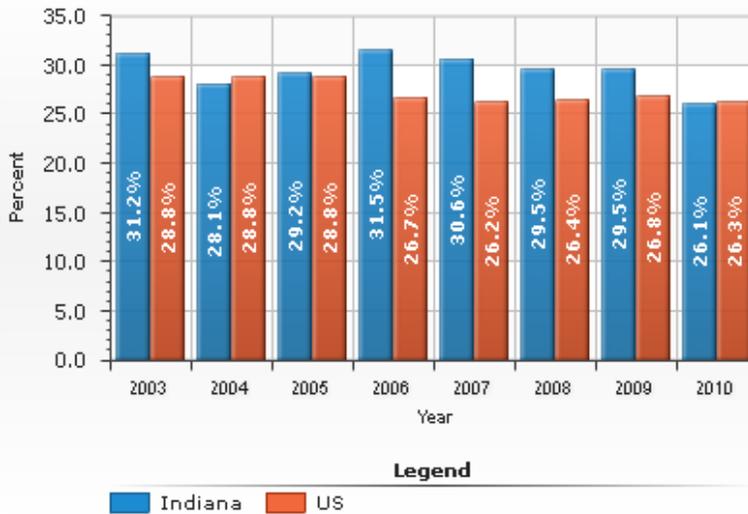
Indiana Volunteering by Age Group (2008-2010)

Age	Median Hours	State Rate	National Rate
16-19	*	21.2 %	26.0 %
20-24	*	19.6 %	18.6 %
25-34	40	23.5 %	22.9 %
35-44	48	34.2 %	31.7 %
45-54	40	30.1 %	30.4 %
55-64	100+	34.8 %	27.8 %
65-74	100+	29.0 %	26.5 %
75+	*	24.2 %	20.3 %

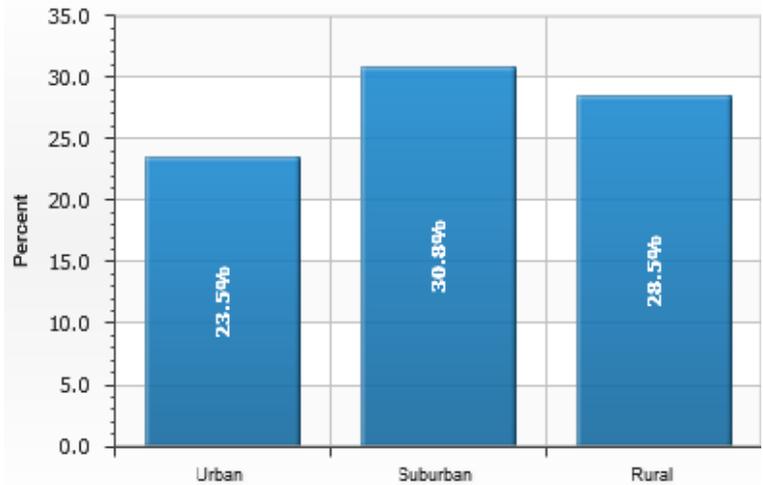
Volunteer Retention



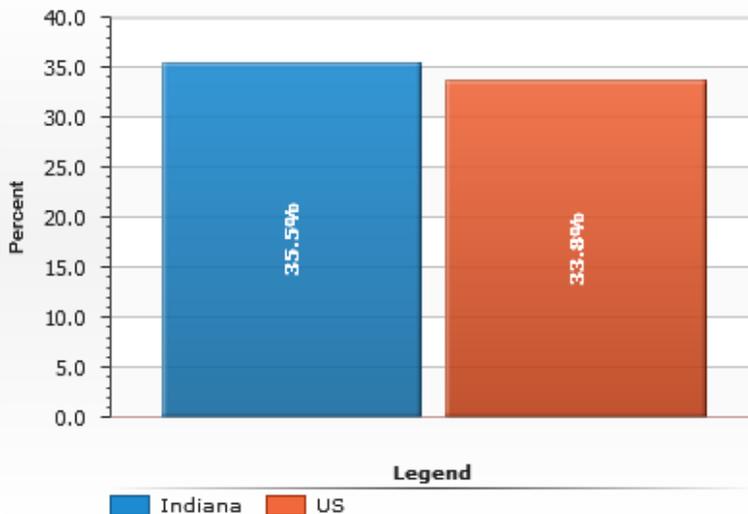
Volunteer Rate



Volunteer Rate by Geographic Area (2008-2010)



Intensive Volunteers (2008-2010)



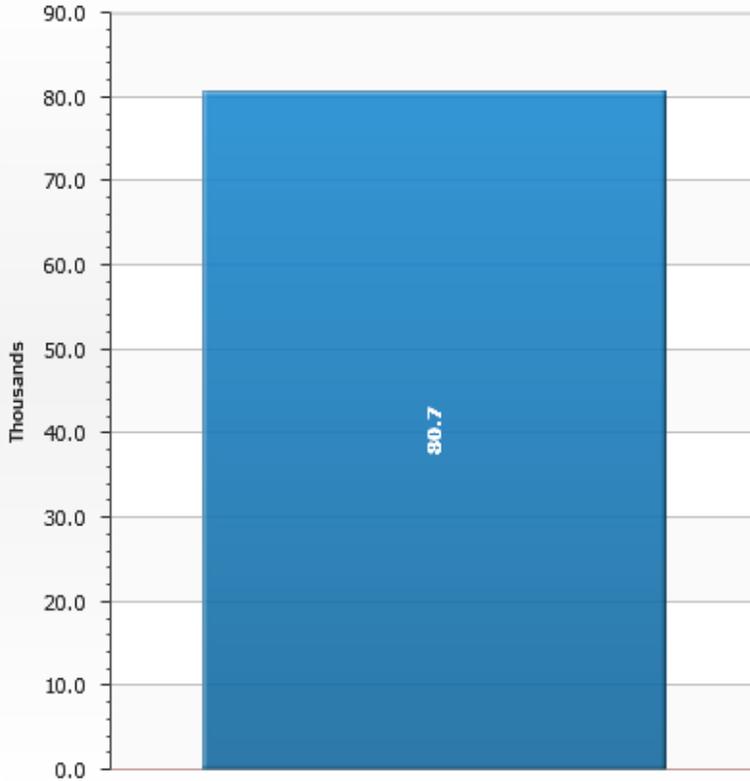
Indiana Volunteering by Special Population and Gender (2008-2010)

Population	Median Hours	State Rate	National Rate
Baby Boomers	56	31.7 %	29.3 %
College Students	*	29.7 %	26.7 %
Millennials	40	19.4 %	21.4 %
Older Adults	100+	26.6 %	23.7 %
Teenagers	*	21.2 %	26.0 %
Young Adults	40	20.4 %	22.0 %
Gender			
Male	52	26.5 %	23.2 %
Female	54	30.2 %	29.6 %

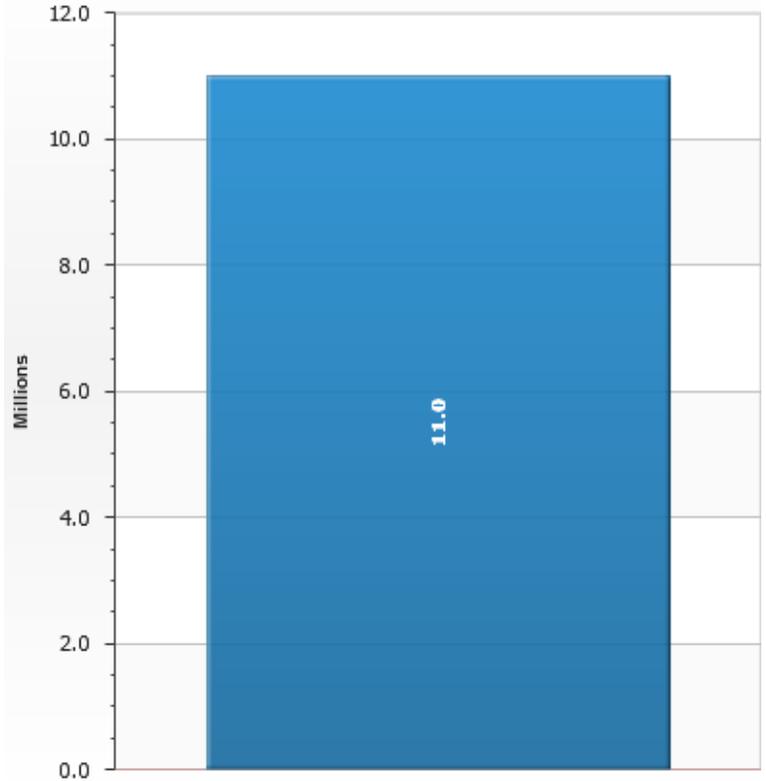
* Not reported due to the sample size for this estimate.

Statistics for this area were collected within the Bloomington Metropolitan Statistical Area (MSA). Bloomington, IN is the only major city included in this MSA.

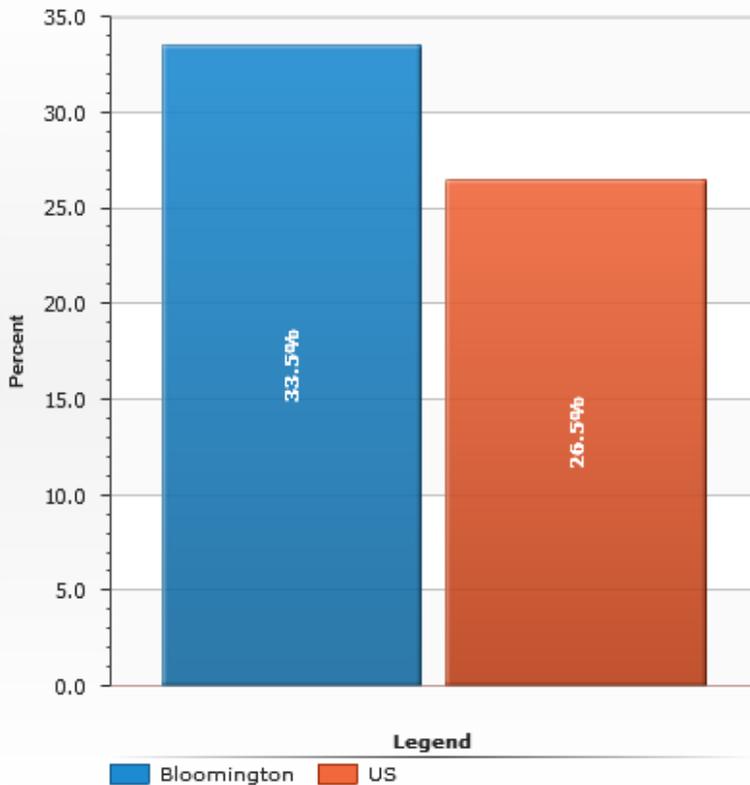
Number of Volunteers



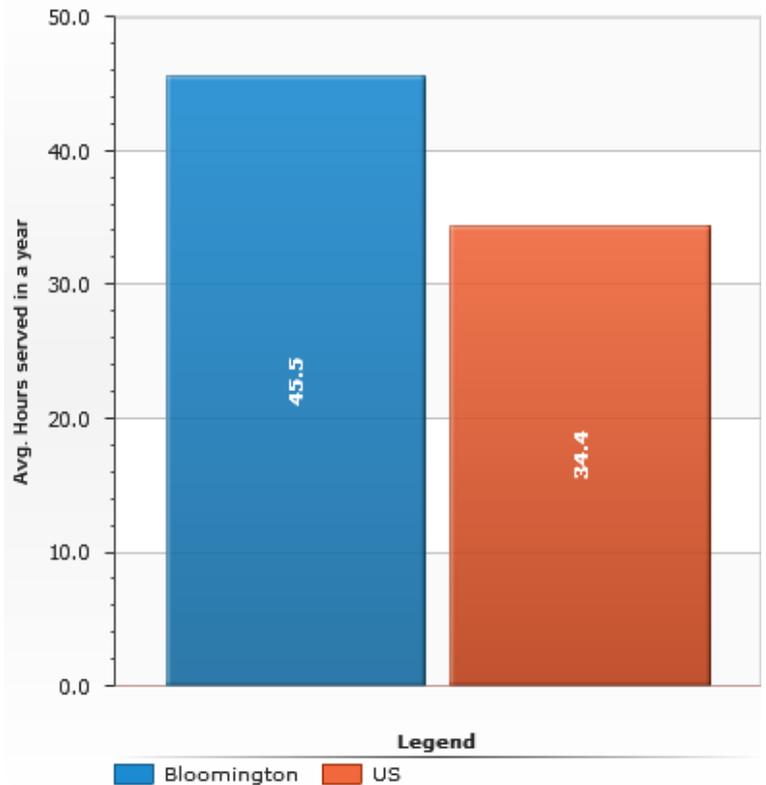
Total Volunteer Hours



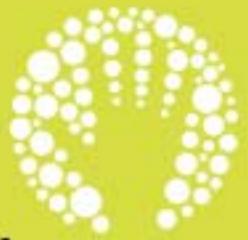
Volunteer Rate



Volunteer Hours Per Resident



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



5 Elements of Volunteer Program Management

Create a Plan for the Volunteer Program

- Conduct regular needs assessments.
- Stay current on the trends in volunteering.
- Assess volunteer positions on a regular basis.
- Write position descriptions for all volunteer duties.
- Build a team of staff and volunteers to guide the program.

Recruit and Place Volunteers

- Plan a recruitment strategy.
- Organize a volunteer recruitment team.
- Implement the recruitment plan.
- Create a screening process for volunteers.
- Place volunteers in appropriate positions.

Orient and Train Volunteers

- Determine the needs of volunteers related to their position.
- Determine the needs of the organization related to the volunteer's position.
- Write learning objectives to address the needs.
- Organize orientation training for volunteers.
- Organize in-service training for volunteers.

Supervise and Recognize Volunteers

- Organize supervision and management activities to support the work of the volunteers.
- Understand the internal and external motivators for volunteers.
- Assist staff in understanding the techniques to work effectively with volunteers.
- Develop a recognition plan.
- Implement the recognition plan.

Evaluate the Volunteer Program

- Develop a plan to evaluate all aspects of the volunteer program.
- Use known standards to assess the program.
- Use the results of the evaluation in the planning process for next year's volunteer program.

Understanding Volunteering



Exploring the Heart of the Volunteer Sector

Why Volunteer?

Why Do People Volunteer?

Why Do They Quit Volunteering?

Benefits and Challenges Surrounding Volunteerism

FOR VOLUNTEERS

Barriers or Challenges to Volunteering

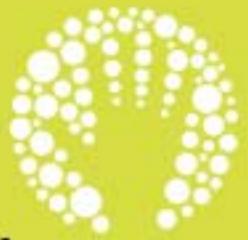
Benefits of Volunteering

FOR ORGANIZATIONS

Challenges for Organizations

Benefits for Organizations

Understanding Volunteering



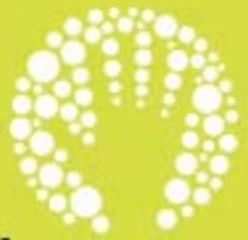
Exploring the Heart of the Volunteer Sector

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 is no right or wrong answer.

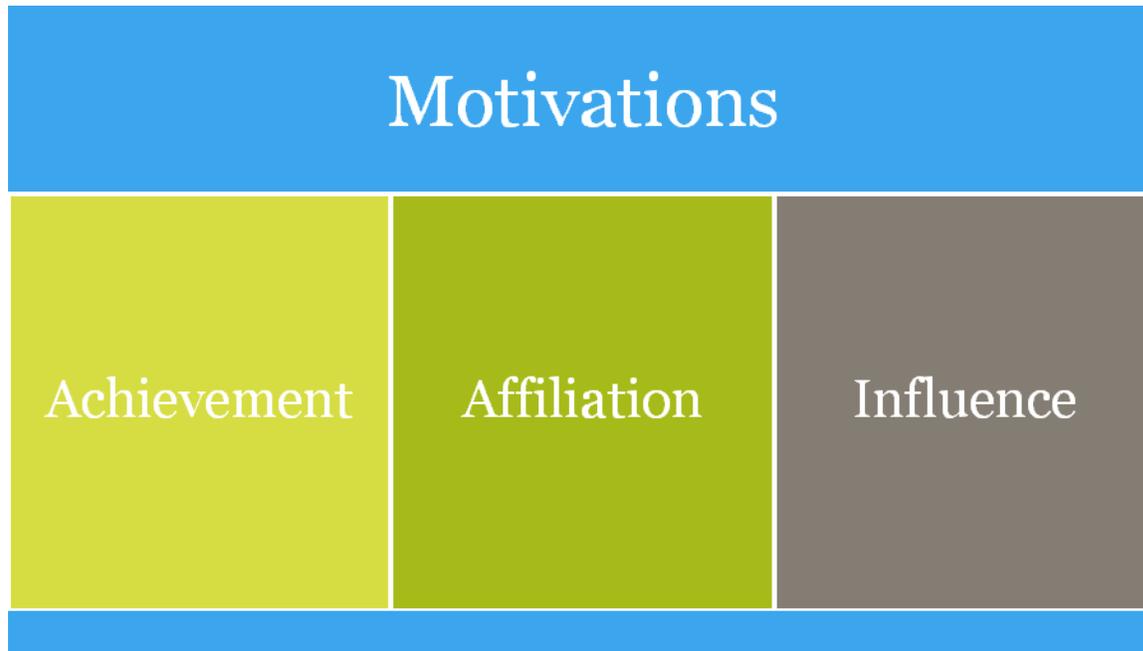
1. a. When doing a job, I prefer to have specific goals.
 b. I prefer to work alone and am eager to be my own boss.
 c. I seem to be uncomfortable when forced to work alone.
2. a. I go out of my way to make friends with new people.
 b. I enjoy a good debate.
 c. After starting a task, I am not comfortable 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.

Understanding Volunteering



Exploring the Heart of the Volunteer Sector

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

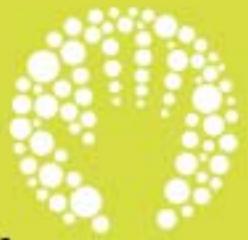
Affiliation Motivations

- 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

Influence Motivations

- Likes to lead
- Enjoys giving advice
- Likes influencing an important project
- Enjoys job status
- Like to have their ideas carried out

Understanding Volunteering



Exploring the Heart of the Volunteer Sector

Motivational Analysis Key

Directions: Record your choice for 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.

Understanding Volunteering



Exploring the Heart of the Volunteer Sector

Social Motivators Worksheet

Directions: Your group has been assigned one of the social motivators. As a group, discuss the following questions in relation to this social motivator.

1. What types of volunteer positions will appeal to a person with this type of motivation?
2. What types of management and supervisory strategies do I need to use to support a volunteer with this motivator?

Record your answers on flip chart paper. Select a reporter to tell the rest of the class what you have decided. Use the table below to record answers for all three social motivators.

	Achievement	Affiliation	Influence
Volunteer positions			
Management and supervision strategies			

Understanding Volunteering



Exploring the Heart of the Volunteer Sector

Resources on Volunteer Management

General Volunteer Resources

- o Points of Light Institute: www.Pointsoflightinstitute.org
- o HandsOn Network: www.handsonnetwork.org
- o Corporation for National and Community Service: <http://www.nationalservice.gov/>
- o National Service Resource Center: <http://nationalserviceresources.org/>
- o Volunteering in America: <http://www.volunteeringinamerica.gov/>
- o Independent Sector: <http://www.independentsector.org/programs/research/gv01main.html>
- o The Council for Certification in Volunteer Administration:
 - o <http://www.cvacert.org/>
- o Non-Profit Risk Management Center: www.nonprofitrisk.org
- o Group Organizing and Social Innovation
 - Stanford Social Innovation Review: <http://www.ssireview.org/>
 - Here Comes Everybody: Organizing Without Organizations: <http://www.youtube.com/watch?v=J80PE1h9OuA>
 - Social Innovation Conversations <http://sic.conversationsnetwork.org/>

Social Media Resources

- o Alison Fine Blog- Social Media for Social Change: <http://afine2.wordpress.com/>
- o Beth Kanter - How Nonprofit Organizations Can Use Social Media to Power Social Networks for Change: <http://beth.typepad.com/>
- o National Service Resource Center: Social Media
 - o <http://www.nationalserviceresources.org/program-management/social-media>
- o Case Foundation- Social Media Tutorials:
 - o <http://www.casefoundation.org/social-media-tutorials>
- o Tips for Entering Your Nonprofit into the Social Media Environment
 - o <http://www2.guidestar.org/rxa/news/articles/2009/tips-for-entering-your-nonprofit-into-the-social-media-environment.aspx>
- o Getting the Personal - Professional Mix Right in Social Media
 - o <http://www.slideshare.net/kivilm/personal-professional-mix-in-social-media-for-nonprofits>

Understanding Volunteering



Exploring the Heart of the Volunteer Sector

Volunteering Trends and Research Resources

- o Volunteering In America – National Volunteer Data from CNCS
 - o <http://www.volunteeringinamerica.gov/>
- o Independent Sector – To learn the standard value of volunteer time.
 - o http://www.independentsector.org/programs/research/volunteer_time.html
- o Energize, Inc.
 - o <http://www.energizeinc.com>

Local Resources

- o State Service Commissions:
 - o <http://www.nationalservice.gov/about/contact/statecommission.asp>
- o HandsOn Network Affiliates: <http://www.handsonnetwork.org/actioncenters>
- o DOVIAs
 - o Many communities have a DOVIA (Directors of Volunteers in Agencies). DOVIAs are local groups that vary in size and focus, but generally they promote professionalism in volunteer management, advocate for issues concerning volunteerism, provide volunteer managers with opportunities to network; and offer professional training and development opportunities. To find a DOVIA near you, visit www.energizeinc.com/prof/dovia.html.
- o Corporate Volunteer Councils
 - o Corporate Volunteer Councils (CVCs) are local coalitions of businesses that either have employee and/or retiree volunteer programs or are interested in initiating such programs. CVCs enhance the effectiveness of employee volunteer program managers through networking, training and access to best practices. To find a CVC near you, contact your HandsOn affiliate in your area. <http://www.handsonnetwork.org/actioncenters>.

Publications

- o Chronicle of Philanthropy
 - o *The newspaper of the nonprofit world* www.philanthropy.com
- o e-Volunteerism
 - o *An online quarterly "publication" on topics related to volunteering.*
 - o www.evolunteerism.com

Planning



Building a Solid Foundation

Volunteer Involvement Needs Assessment

Brainstorming with staff - Questions to ask yourself and organizational staff to identify unmet needs that may be accomplished by engaging volunteers.

If money were not an issue, what would you be doing that you are not doing now?

What is on your wish list?

What is on your to-do list that never gets accomplished because you don't have the time or resources?

Is there a population that needs to be served that you have not been able to serve?

Is there a program that you have been wanting to start but don't have the resources?

Are there marketing, technology, financial, training or other types of skills needed to support any of your projects?

What else?

Planning



Building a Solid Foundation

Volunteer Involvement Staff Assessment

For staff – ask staff members to fill out this general sheet

Name of Staff member _____

Previous experience:

1. Have you previously worked at an agency that utilized volunteers?
 Yes No unsure
2. Have you ever supervised volunteers?
 Yes No unsure
3. Do you perform any volunteer work?
 Yes No (if yes, explain what type and capacity you served):

Your assessment of volunteer service/involvement:

1. Give your general evaluation of the need for utilizing volunteers in our agency.
 Very advantageous Somewhat needed Uncertain
 Not needed Not appropriate
2. Give your general assessment on our agency's readiness to utilize volunteers.
 Very ready somewhat ready uncertain not ready
3. What type of work or areas do you think volunteers would be needed or suited for?

4. What type of work or areas in our agency that you think volunteers should not do?

5. Prior to working with volunteers, what type of training would you like to receive?

6. Do you have any other comments, suggestions, or questions about the involvement of volunteers in our agency?



Building a Solid Foundation

Staff Request for Volunteer Assistance

For staff – ask staff members to fill out this sheet for specific requests

Date of request _____
Department _____
Staff member completing this form _____
Phone _____ E-mail _____
Supervisor name, phone, email if different: _____

Description of the tasks/activities to be performed: (give both goal and example of activity)

Number of volunteers needed for this position: _____

Qualifications: (give both skills and attributes needed to perform the work and anything that might disqualify an applicant)

Worksite:

Timeframe:

Hours:

Flexible to availability of volunteer

Needed: _____

Length of Commitment:

Open-ended

Minimum of: _____

One-time event (date and time): _____

When do you want this opportunity to start?

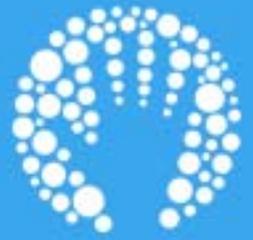
Upon availability

Other: _____

Provide names of staff and/or volunteer(s) responsible for

Orientation _____

Training _____



Building a Solid Foundation

Methods for Conducting Needs Assessments

Interviews

PRO	CON
<ul style="list-style-type: none">▪ Can get the highest quality data▪ Offers the potential to ask more questions▪ Can record person's responses that are nonverbal▪ Best completion or return rate	<ul style="list-style-type: none">▪ Is expensive▪ Takes a long time to complete▪ Interviewer bias can skew the results

Telephone Surveys

PRO	CON
<ul style="list-style-type: none">▪ Inexpensive▪ Short completion time▪ Easy to organize▪ Can be done after work hours	<ul style="list-style-type: none">▪ Can be perceived by respondent as a nuisance▪ Must have trained interviewers or can lose validity and reliability▪ Can lose flexibility▪ No visual cues or information

Mail Surveys

PRO	CON
<ul style="list-style-type: none">▪ People can remain anonymous▪ Can be done according to respondent's time table	<ul style="list-style-type: none">▪ Very costly▪ Has low return rate (15-20 percent)▪ No two-way communication▪ Need to have the questions designed by person who knows how to do it—expensive▪ No chance to correct confusion on part of the respondent.

Planning



Building a Solid Foundation

Focus Groups

PRO	CON
<ul style="list-style-type: none">▪ Free exchange of information▪ Can address various areas of concern▪ Uses an experienced facilitator to get the best results▪ Inexpensive	<ul style="list-style-type: none">▪ Need more than one group to ensure the validity of results▪ Need to keep record of what is said▪ People need to know clearly their purpose or they can get off topic

Email/Web Surveys

PRO	CON
<ul style="list-style-type: none">▪ Quick▪ Inexpensive▪ Reach a lot of people easily	<ul style="list-style-type: none">▪ No two-way communication▪ Need expertise to design questions—can be expensive▪ No chance to correct confusion on part of the respondent.▪ Responses not anonymous

Other _____

PRO	CON



Vision, Mission and Purpose Statements

1. **A Vision** statement is a detailed description of the future the organization is trying to create.

Example: The Grand View Food Bank envisions a community where all residents have access to affordable and healthy food.

2. **A Mission** statement is a one- or two-sentence statement that outlines the specific reason for which the organization exists.

Example: The mission of the Grand View Food Bank is to provide nutritional food and nutrition education to the poor.

3. **A Purpose** statement describes how a project or program contributes to the achievement of the organization's mission.

Example: The purpose of the Grand View Food Bank Volunteer Program is to coordinate the distribution of donated food to those in need in the community, through the efforts of volunteers.



Building a Solid Foundation

Writing a Purpose Statement Example

Directions: A purpose statement grows out of discussion. Volunteer advisory groups should participate in determining the purpose of the volunteer program. If you do not have an advisory group, gather experienced and new volunteers together to answer the questions on this form and then write up a draft statement. The draft needs to be approved by the administration of your organization.

1. Write the mission statement of your organization here.
The mission of the Grand View Food Bank is to provide nutritional foodstuffs and nutrition education to the poor.
2. In general, what are the needs the volunteer program exists to fill?
 - Involve organizations that can donate food
 - Involve volunteers who can sort, label and distribute food
 - Involve individuals who are effective at administrative chores related to acquiring and distributing food
 - Involve recipients as volunteers in the distribution of food.
3. Who are the key stakeholders in the volunteer program?
 - Staff
 - The clients who receive food
 - Individuals interested in helping the clients
 - Social service agencies serving low-income areas/individuals
 - Restaurants, food stores, commercial food vendors, individuals, farmers
4. Using the information from these questions draft a purpose statement for the volunteer program.
The purpose of the Grand View Food Bank Volunteer Program is to coordinate the distribution of donated food to those in need in the community, through the efforts of volunteers.



Writing a Purpose Statement Worksheet

Directions: A purpose statement grows out of discussion. Volunteer advisory groups should participate in determining the purpose of the volunteer program. If you do not have an advisory group, gather experienced and new volunteers together to answer the questions on this form and then write up a draft statement. The draft needs to be approved by the administration of your organization.

1. Write the mission statement of your organization here.

2. In general, what are the needs the volunteer program exists to fill?

3. Who are the key stakeholders in the volunteer program?

4. Using the information from these questions draft a purpose statement for the volunteer program.



Building a Solid Foundation

Risk Analysis of Volunteer Position

1. Volunteer Position / Activity:

2. What do our volunteers do? (Or what new activity do we want them to do?)

3. What could go wrong?

4. How probable is it that something serious will go wrong? Highly probable
 Somewhat probable
 Not very probable

5. How serious an issue would it be? Very serious
 Somewhat serious
 Not very serious

6. What would we do if something goes wrong?

7. How will the organization pay for it?

8. How can we diminish the probability and/or protect ourselves?

9. Can we still ask a volunteer to do this? YES NO

Planning



Building a Solid Foundation

Volunteer Program Budget Worksheet

The following are items that you may want to consider when drafting a budget for your volunteer program.

Category	Sample Items	Estimated Amounts
Staff salary and benefits		
Equipment		
Office supplies		
Other materials		
Printing/copying		
Postage		
Phone/e-mail/Internet		
Advertising/marketing		
Events		
Food		
Other:		
Other:		

Planning



Building a Solid Foundation

Sample Volunteer Program Budget Worksheet

Here is a sample budget-in-progress from a volunteer program.

Category	Sample items	Estimated amounts
Staff salary and benefits	Volunteer Coordinator	\$38,000/yr
Equipment	6 Shovels 3 Rakes 8 basketballs	6 x \$35 = 3 x \$25 = 8 x
Office supplies	General supplies Envelopes, labels Colored paper	\$20/mo ?? \$12/ream x 20 reams = \$240
Other materials	Work gloves Trash bags (50-count boxes)	50 pairs x _____ = \$ _____ 20 x \$12.50 =
Printing/copying	Recruitment brochure Training manuals Applications, etc.	\$750 \$300 \$400
Postage	Newsletter mailing General	\$55/mo x 12 = \$660 \$20/mo x 12 = \$240
Phone/email/internet	Phone ISP/Web hosting	\$18/mo x 12 = \$216 \$35/mo x 12 = \$420
Advertising/marketing	Newspaper ad (semi-annual) Award winner ad (1/yr)	\$185 x 2 = \$370 \$300
Recognition	Service pins Annual awards event	\$5 x 150 = \$750 \$2,500 (see separate budget)
Food	Sodas & snacks Bottled water Volunteer picnic	\$20/wk x 52 = \$1040 50 cases x \$14 = \$700 \$150
Transportation	Bus tokens Mileage reimbursement	\$1.10 x 500 = \$550 \$0.33/mile x 1,000 mi = \$330
Other:	First aid kits	3 x _____ = \$ _____



Building a Solid Foundation

Volunteer Position Description

Use the worksheet below to outline responsibilities, support and benefits of specific volunteer opportunities. Be as detailed as possible and use clear language. Avoid using jargon or acronyms that new volunteers may not understand.

Position Title: _____

Purpose/Objective: _____

Location: _____

Key Responsibilities: _____

Impact Goals: _____

Qualifications: _____

Time Commitment/ Expectations: _____ Training/support provided: Yes No
If yes, type of training: _____

Benefits: _____

Supervisor: _____
Phone: _____ e-mail: _____

Program Website: _____



Building a Solid Foundation

SAMPLE VOLUNTEER POSITION DESCRIPTIONS

Silver Spring Senior Home

- | | |
|--|---|
| 1) Position Title | Senior Swim Club Driver |
| 2) Tasks | Drive two to four seniors to public pool every week
Be friendly to these seniors |
| 3) Expectations regarding number of hours and times | Three hours per week, from 7:00 - 10:00 a.m., on Wednesdays.
Not expected to miss more than one Wednesday per quarter. |
| 4) Qualifications | Owns automobile with insurance |
| 5) Position benefits | Swim regularly
Get out of the office/home one morning a week |

Bright Future Youth Center

- | | |
|--|--|
| 1) Position Title | Off-Site Youth Advisor |
| 2) Tasks | Provide staff who manage at-risk youth programs advice on how to handle specific difficult situations through the following process:
1) Staff send an e-mail with a brief description of the issue to a pool of off-site youth advisors.
2) Any off-site youth advisors who feel they might be helpful respond with available times for the staff to call them.
3) Staff calls one or more advisors for advice. |
| 3) Expectations regarding number of hours and times | It is expected that off-site youth advisors will take one call per quarter, at a convenient time. |
| 4) Qualifications | Licensed counselor, social worker or psychologist
Access to email |
| 5) Position benefits | Obtain experience working with youth
Do something rewarding without having to leave home or office |

Planning



Building a Solid Foundation

Volunteer Program Planning

Rate your volunteer program using the scale to the right. Use the space provided to begin planning ways to improve any areas that you scored a three or lower.

Scale: 1- Help! 2 – Poor 3 – Fair 4 – Good 5 - Excellent

Element of A Successful Volunteer Program	Score	Plans to Improve
1. Our organization has a mission statement.		
2. Volunteers are familiar with the mission of the organization.		
3. There is a documented purpose statement.		
4. We assess the need for volunteers.		
5. We use more than one method for obtaining information about the volunteer program.		
6. There are criteria for determining appropriate roles for volunteers.		
7. All volunteer tasks have a written position description.		
8. Volunteer positions are reviewed regularly.		
9. Staff and volunteer work together to identify position		



Building a Solid Foundation

Resources

Volunteer Management

Campbell, Katherine Noyes, and Susan J. Ellis. (1995). *The (Help!) I-Don't-Have-Enough-Time Guide to Volunteer Management*. Philadelphia, PA: Energize, Inc.

Connors, Tracy Daniel, ed. (1995). *The Volunteer Management Handbook*. New York, NY: John Wiley and Sons.

Ellis, Susan J. and Jayne Cravens. (2000). Virtual Volunteering Guidebook. Energize: Available at no charge on the Energize web site at: www.energizeinc.com

Fisher, James C. and Katherine Cole. (1993) *Leadership and Management of Volunteer Programs*. San Francisco: Jossey-Bass.

Kretzman, J. P., and J. McKnight. (1997). *Building Communities From the Inside Out: A Path Toward Finding and Mobilizing Community Assets*. New York, NY: Acta Publications.

Lee, Jarene Frances, with Julia M. Catagnus. (1998). *What We Learned (the Hard Way) About Supervising Volunteers: An Action Guide for Making Your Job Easier*. Philadelphia, PA: Energize, Inc.

McCurley, Steve H., and Rick Lynch. (1996). *Volunteer Management: Mobilizing All the Resources of the Community*. Downers Grove, IL: Heritage Arts Publishing.

Volunteer Management: Mobilizing All the Resources of the Community 2nd Edition
by Steve McCurley and Rick Lynch http://www.bettystallings.com/books/mccurl_volmgmt.htm

Developing and Managing Volunteer Programs
<http://managementhelp.org/staffing/outsrcng/volnteer/volnteer.htm>

Council for Certification in Volunteer Administration <http://www.cvacert.org/>

Volunteer Management Resource Center - <http://www.idealists.org/vmrc>

A list of books and articles on the subject of Role of a Volunteer Manager
<http://www.energizeinc.com/art/subj/role.html>

Ethics

Professional Ethics in Volunteer Administration, originally developed by the former Association for Volunteer Administration and kept current by the Council for Certification in Volunteer Administration
<http://www.cvacert.org/documents/ProfessionalEthicsinVolunteerAdministration-2006.pdf>

How to Advocate for the Profession

<http://www.idealists.org/en/vmrc/howtoadvocate.html>

A Guide to Investing in Volunteer Resources Management: Improve Your Philanthropic Portfolio (PDF) – The UPS Foundation, Points of Light Foundation, and the former Association for Volunteer Administration (includes a section on why volunteer management is critical)
http://www.pointsoflight.org/sites/default/files/invest_vrm_guide.pdf



Building a Solid Foundation

Volunteer Management Capacity in America's Charities and Congregations: A Briefing Report (PDF) – The Urban Institute

http://www.urban.org/UploadedPDF/410963_VolunteerManagment.pdf

Volunteer Management Practices and Retention of Volunteers (PDF) – The Urban Institute

http://www.urban.org/UploadedPDF/411005_VolunteerManagement.pdf

Risk Management

Non Profit Risk Management Center, 2010 No Surprises Volunteer Risk Management Tutorial Retrieved from

<http://www.nonprofitrisk.org/tools/volunteer/no-surprises.shtml>

Volunteers Are Human Resources...or Are They? by Susan J. Ellis in *The NonProfit Times*, 2003

energizeinc.com/art/subj/documents/2003AugustNPTHumanResources_001.pdf

Risk Management; articles and Book excerpts on the topic

<http://www.energizeinc.com/art/subj/risk.html>

Running the Risk: A Risk Management Tool for Volunteer Involving Organizations

http://www.volunteeringaustralia.org/html/s02_article/article_view.asp?id=129&nav_cat_id=164&nav_top_id=61&dsa=451

Negotiating the Legal Maze to Volunteer Service

<http://www.ed.gov/inits/americanreads/resourcekit/Negotiating/title.html>

A 1998 "community service brief" from the Nonprofit Risk Management Center.

The Three Top Reasons Volunteers Get Sued

<http://www.nonprofitlaw.com/volrisk/index.shtml>

Details (and PowerPoint slides) of Sandra Pfau Englund's conference presentation on legal issues related to volunteers, on the nonprofitlaw.com Web site.

Volunteer Legal Handbook <http://www.iciclesoftware.com/VLH7/>

Legal handbook for nonprofit corporation volunteers. Offers examples of "awful situations" and how to prevent them, with advice on volunteer screening, evaluation, training and insurance.

Volunteer Risk Management Tutorial

<http://nonprofitrisk.org/tools/volunteer/no-surprises.shtml>

Tutorial offered by the Nonprofit Risk Management Center. This online tool explains how to control risks in a volunteer program to protect the agency, the volunteers, and the clients.

Volunteers Insurance Service

<http://www.cimaworld.com/htdocs/volunteers.cfm>

Most established American insurance program for volunteers. Site includes online version of their printed newsletter, *VIS® Connections*, at <http://www.cimaworld.com/visconnections/>.

Reference Checks <http://www.energizeinc.com/art/astaf.html>

Energize Inc. <http://www.energizeinc.com/>

The National Services Resource Center

<http://www.nationalserviceresources.org/topics/service-activities>

A list of books and articles on the subject of policy development

<http://www.energizeinc.com/art/subj/pol.html>

Recruitment & Placement

Matching Volunteer Skills with Service Needs



Develop a Targeted Recruitment Plan

Step 1: Target Your Market

Step 2: Identify Benefits and Features of Volunteer Position

Benefits: What volunteering does for the volunteers, such as teaching them a skill, having fun, meeting people, etc.

Examples:

- Increased knowledge, skill, or experience
- Professional development
- Networking
- Reimbursement of expenses
- Being a part of your community
- Sense of accomplishment
- Be a part of the solution to social problems locally
- Others

Features: Descriptive elements of the volunteering, such as when, where, doing what with whom, etc.

- **What** - Describe the overall position in a clear, comprehensive, concise manner.
- **When** - What is the time commitment for this position? Is it an ongoing, regularly scheduled opportunity, a one day service project, or could the volunteer complete the position requirements according to their schedule?
- **Where** - Where is the volunteer opportunity? Does the position require the volunteer to be in a certain place or
- can the position requirements be carried out anywhere? Is it a virtual volunteer opportunity?
- **Why** - What need is this volunteer opportunity filling?
- **With Whom** - Will the volunteer be working with other individuals to carry out their duties?
- **Other Key Information** - Is there any other critical information for the volunteer to know about this position?

Step 3: Craft a Powerful Message

Present a Complete Picture - The body of the Message should present information in an order that psychologically matches how people will think about the offer:

- **Need:** Is there a problem?
- **Solution:** Can this job help solve it?
- **Fears:** Will I be capable of helping with it?
- **Benefits:** What's in it for me?
- **Contact:** How do I get involved?

Step 4: Design a Communication Strategy

Recruitment & Placement



Matching Volunteer Skills with Service Needs

Target Markets:
Identify your Circle of Recruitment Resources

Within Your Organization:

Geographic/Neighboring:

Ideological/Cause Sharing:

Business/Corporate:

Communities of Faith:

Community:



Civic/Professional Groups:

IU/Education/Schools:

Peer Organizations:

Other:

Recruitment & Placement

Matching Volunteer Skills with Service Needs



Recruitment Message Worksheet

Who is your target audience? (Choose one for this exercise.)

What is the need that this opportunity is addressing? How can this opportunity solve it?

What are some benefits of the position? What would appeal to your target audience about the position?

What are important features of the position?

What are some possible barriers or fears that a volunteer may perceive?

What additional things do we need to know about the target audience?

Craft a Powerful Message - Simplify your message and get creative.

Recruitment & Placement

Matching Volunteer Skills with Service Needs



Sample Recruitment Message

Job Title:

Senior Swim Driver

Work Location:

Downtown YMCA

Reports to:

Director of Senior Programs

Purpose of the position:

To help seniors get regular exercise

Responsibilities/Duties:

Picks up and drives two to four seniors to YMCA pool once a week.

Qualifications:

Eligible candidates include adults over 21 years of age who have automobile with insurance, good driving record and who pass a criminal history record check.

Must be dependable and enjoy working with seniors

Commitment:

Three hours per week, from 7 - 10 a.m.

Every Wednesday for six months

Responsible for arranging for a replacement driver from volunteer list in advance of a known absence

Training:

Two-hour orientation and training session

Benefits to volunteer:

Get regular exercise and free swim pass good on any day (courtesy of YMCA)

Mileage reimbursement

Message:

Earn a free pool pass! Become a Senior Swim Club Driver for the Silver Spring Home taking our seniors once a week to the pool will get you poolside, plus provide you a free YMCA pool pass! All you have to do is dive in.

Requirements are as follows:

- Availability Wednesday mornings from 7 - 10 a.m.
- Driver's license, insurance and car that can seat at least three passengers

Willingness to help others

Recruitment & Placement



Matching Volunteer Skills with Service Needs

Step 4: Design a Communication Strategy

What strategies should you use to reach your audience?

What are some techniques you utilize? What is the most effective technique?

Population	Technique

Recruitment Techniques

- Social media tools to facilitate social networking (Facebook, MySpace, Twitter, YouTube)
- Fliers
- Internet sites (Idealist.org, Volunteermatch.org, craigslist.org)
- Organization Website
- Local community centers
- Retirement homes
- Grocery stores
- Family members
- Friends
- Colleges
- Local schools
- Doctor offices
- Workplace
- HandsOn Action Centers or other volunteer centers
- Public events
- Student center
- Dining hall
- Sports clubs
- Coffee shops
- Email listservs
- Telephone
- Mailings
- Non-profit organizations
- Local businesses
- Local government
- Current volunteers
- Faith-based organizations
- Military groups
- Teacher associations
- Unions
- Mom's groups
- Others

Recruitment & Placement

Matching Volunteer Skills with Service Needs



Sample Interviewing Questions

- What interested you about this volunteer position?
- Is there an aspect of our mission that motivates you to want to volunteer?
- Tell me the story of how you chose your education program OR career path OR life work?
- Have you volunteered in the past?
 - Yes: What have you enjoyed most about previous volunteer work?
 - No: What have you enjoyed most about previous paid work or other activities?
- Are you involved in other organized activities?
- What special skills would you like to utilize as a volunteer?
- Are there tasks that you do not want to do as a volunteer?
- Can you briefly talk about your experiences as they relate to this position?
- What would you say are three of your strengths?
- Do you prefer working independently or with a group?
- What would be the ideal volunteer job for you and why?
- Describe your ideal supervisor.
- What are your expectations of our organization? Of our employees?
- What are your personal goals for this experience?
- Do you have any concerns about what we expect of you?
- Are you willing to make a time commitment of ____?
- Are you interested in some training pertinent to this position?
- Do you have any questions that you would like to ask us?

Recruitment & Placement

Matching Volunteer Skills with Service Needs



Resources

Social Media and Networking

Mashable: The Social media Guide <http://mashable.com>

Beth's Blog: How Nonprofit Organizations Can Use Social Media to Power Social Networks for Change <http://beth.typepad.com>

Social Media Governance <http://socialmediagovernance.com>

A list of books and articles on the subject of social networking <http://www.energizeinc.com/art/subj/inter.html>

People to Follow on Twitter

Allison Fine, nonprofit social media guide and author of *Momentum*: [@Afine](https://twitter.com/Afine)

Beth Kanter, nonprofit social media guru extraordinaire: [@kanter](https://twitter.com/kanter)

Tera Wozniak Qualls, Gen Y nonprofit blogger: [@terawozqualls](https://twitter.com/terawozqualls)

Holly Ross, Executive Director of Nonprofit Technology Network (NTEN): [@ntenhross](https://twitter.com/ntenhross)

Stanford Social Innovation Review: [@SSIRReview](https://twitter.com/SSIRReview)

Nonprofit Quarterly: [@npquarterly](https://twitter.com/npquarterly)

Nonprofit Times: [@NonProfitTimes](https://twitter.com/NonProfitTimes)

Social Networking Tutorials

Case Foundation

<http://www.casefoundation.org/social-media-tutorials>

Recruitment

Volunteer Management Resource Library

<http://www.energizeinc.com/art.html>

A list of articles and books on the subject of recruitment - Energize Inc.

<http://www.energizeinc.com/art/subj/recruit.html>

The Resource Center

<http://www.nationalserviceresources.org/volunteer-member-staff-management/recruitment>

Volunteer Recruitment and Tips from the Field

<http://www.utexas.edu/lbj/rgk/serviceleader/leaders/tips.php>

"Exploring Employment Trends for Volunteer Insights," Merrill Associates, February 2004.

<http://merrillassociates.com/topic/2004/02/exploring-employment-trends-volunteer-insights/>

Volunteer Trends

Volunteering in America Report

<http://www.volunteeringinamerica.gov/>

Trends and Issues in Volunteer Management

<http://www.energizeinc.com/art/subj/trends.html>

Screening, Interviewing, and Placement

Recruitment & Placement

Matching Volunteer Skills with Service Needs



A list of books and articles on screening
<http://www.energizeinc.com/art/subj/scree.html>

Utilizing Role Playing Scenarios in Volunteer Interviewing, Steve McCurley 1994
http://nationalserviceresources.org/files/legacy/filemanager/download/708/roleplay_interviews.pdf

A list of articles and books on the subject of Virtual Volunteering
<http://www.energizeinc.com/art/subj/inter.html>

Volunteer Work Design – Energize, Inc.
<http://www.energizeinc.com/art/subj/workdes.html>

Step 2: Screening, from the book No Surprises: Controlling Risks in Volunteer Programs
<http://www.energizeinc.com/art/anos.html>

Generations

Mixing and managing Four Generations of Employees
<http://www.fdu.edu/newspubs/magazine/05ws/generations.htm>

The Resource Center's "Ask the Expert," Andrea S. Taylor, Ph.D., of Temple University's Center for Intergenerational Learning, in Philadelphia.
<http://www.nationalserviceresources.org/practices/17902>

Effective Practices Provided by Temple University Center for Intergenerational Learning
<http://www.nationalserviceresources.org/ep-temple>



Training and Orientation

Definitions:

Orientation: The process of introducing the volunteer to your organization and volunteer program.

"Orientation is the process of making volunteers feel comfortable with and understand the workings of the organization...and to let them understand how they can contribute to the purpose of the organization."

Source: McCurley & Lynch, Volunteer Management, 2006

Training: The process of providing volunteers with the knowledge, skills and attitude needed to perform specific volunteer roles/duties.

Components of Volunteer Orientation

Cause: Introduces the volunteers to the mission and purpose of the organization.

Answers the question: *"Why should I volunteer here?"*

System: Introduces organizational structure and systems and situates the volunteer role within the organization as it relates to the mission of the organization

Answers the question: *"How will I be volunteering here?"*

Social: Introduces the volunteer to the social context/community they are being invited to join

Answers the question: *"Where do I fit in?"*

Training & Orientation

Achieving Service Excellence



Orientation Worksheet

Write down a few key points about your organization for each category:

Cause - Answers the question: "*Why should I volunteer here?*"

Introduces the volunteers to the mission and purpose of the organization.

Mission and Values
Population Served
Important Organizational History
Key Programs & Services
Organizational Partners
Organizations Strategic Plans

Training & Orientation

Achieving Service Excellence



Orientation Worksheet

System - Answers the question: *"How will I be volunteering here?"*

Introduces organizational structure and systems and situates the volunteer role within the organization as it relates to the mission of the organization

Organizational Structure and Programs

--

Policies and Procedures

--

Facilities and Equipment (e.g., bathrooms, refrigerator, recycling)

--

Volunteer Benefits and Position Requirements

--

Record-keeping Requirements

--

Organizational Activities and Events

--

Training & Orientation

Achieving Service Excellence



Orientation Worksheet

Social - Answers the question: *"Where do I fit in?"*

Introduces the volunteer to the social context/community they are being invited to join

Organizational Leadership

--

Organizational Culture and Etiquette

--

Social Events

--

Organizational Activities and Events

--



Identify Training Needs

Every volunteer needs certain knowledge, skills and attitudes to perform their volunteer functions. Those that they need and don't already have can be developed through training.

Knowledge: Information.

Skills: Ability to perform tasks.

Attitude: The way one feels about something or the way one sees it.

Sample Position Description

1. Position Title	Youth Supervisor
2. Tasks	Supervise outdoor free time and, during structured activities, meet with youth who are not able to participate in group activities due to discipline or other problems
3. Hours & Times	3:00 – 5:00 p.m. at least one day per week between Monday and Thursday
4. Qualifications	Willing to work with youth, including at-risk youth
5. Benefits	Enjoy outdoors with youth, learn child development strategies from instructors, and develop deeply satisfying relationships with youth and staff

What KSAs is a person in this position likely to need that they do not already have?

Knowledge:

Skills:

Attitude:

Training & Orientation

Achieving Service Excellence



Design Your Training

The last 100 years or so have generated a lot of information on how adults learn. This knowledge can be summarized and applied to volunteering through the Principles of Effective Volunteer Training Design, listed below. Overall, training provided to adults needs to be relevant, be rooted in experience, help to problem solve and demonstrate immediate value.

Principles of Effective Volunteer Training Design	Examples of Learning Activities
1. Build on participants' experience	<ul style="list-style-type: none"> • Facilitated discussion • Participant reflection / brainstorming • "War stories" • Other:
2. Make training experience interactive	<ul style="list-style-type: none"> • Group problem solving • Position shadowing • Small group work • Other:
3. Communicate through visual, auditory, and experiential modes	<ul style="list-style-type: none"> • Demonstrations • Skills practice • Flip chart • Video • Other:
4. Apply learning	<ul style="list-style-type: none"> • On-the-job training • Position shadowing • Skills practice • Other:

Training & Orientation

Achieving Service Excellence



Training Design Outline

Write an objective and design a learning activity that will help volunteers develop a particular knowledge, skill or attitude (KSA).

Volunteer Position Name:

1	Learning Objective (KSA) <input type="checkbox"/> Recruit for <input type="checkbox"/> Train for	Format: <input type="checkbox"/> worksheet <input type="checkbox"/> game <input type="checkbox"/> project <input type="checkbox"/> brainstorm <input type="checkbox"/> poll <input type="checkbox"/> lecture <input type="checkbox"/> discussion <input type="checkbox"/> role play <input type="checkbox"/> other:
	Learning Activity	
	Description	
	Materials	
2	Learning Objective (KSA) <input type="checkbox"/> Recruit for <input type="checkbox"/> Train for	Format: <input type="checkbox"/> worksheet <input type="checkbox"/> game <input type="checkbox"/> project <input type="checkbox"/> brainstorm <input type="checkbox"/> poll <input type="checkbox"/> lecture <input type="checkbox"/> discussion <input type="checkbox"/> role play <input type="checkbox"/> other:
	Learning Activity	
	Description	
	Materials	
3	Learning Objective (KSA) <input type="checkbox"/> Recruit for <input type="checkbox"/> Train for	Format: <input type="checkbox"/> worksheet <input type="checkbox"/> game <input type="checkbox"/> project <input type="checkbox"/> brainstorm <input type="checkbox"/> poll <input type="checkbox"/> lecture <input type="checkbox"/> discussion <input type="checkbox"/> role play <input type="checkbox"/> other:
	Learning Activity	
	Description	
	Materials	

Training & Orientation

Achieving Service Excellence



Training Delivery

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

Training Evaluation

How will training be evaluated?



Strategies for Managing Awkward Silences

At some point, every trainer experiences participants' total silence after posing a question. Although such silence is not necessarily a negative thing, it can be awkward for both trainer and participants. This is particularly true if it visibly frustrates the trainer. Below are some strategies for successfully managing such moments. Because such silence is usually the result of participants' confusion, uncertainty about their answer (they may need to think about it longer), discomfort with speaking in the large group, each strategy addresses all of these factors.

For Factual Questions

Provide the Answer. When the question is a factual one—such as “What is the mission of this organization?”—the best response to the prolonged silence is to simply provide the right answer without judgment. This is a good way to determine if you are covering material that is too basic or too advanced for participants.

For Opinion Questions

Facilitate Small Group Discussion. If your question is not a factual one and you have gotten no response for approximately ten seconds (note: this can feel like a very long time from the trainer perspective), you can instruct the group to discuss the question in pairs or small groups. Announce that you will write the question on the flip chart or overhead transparency and that they will have two minutes to think about the question, and ask them if they have any questions on the assignment. An example of this instruction is, “Take two minutes to discuss this question with a partner. I will write the question you are discussing on the flip chart. Any questions before we start?” At the completion of the two minutes, you can either invite participants to share or have each pair report out.

Facilitate Individual Thinking. If your question is not a factual one and you have gotten no response for approximately ten seconds (again, this can feel like a very long time from the trainer perspective), you can instruct participants to think about the question individually and write down their answer on piece of paper that you will read aloud. Announce that you will write the question on the flip chart or overhead transparency, and ask them to raise their hand if they have any questions so that you can come by and help them. An example of this strategy may sound like this: “Take a minute to think about this question and write your answer on a piece of scrap paper. When we are done, pass your responses up to the front and I will read them aloud. I will write the question you are answering on the flip chart. If you would like further guidance or assistance, raise your hand and I will come help you.”



Evaluate and Refine

It's critical to assess to what degree the training has reached its objectives, in order to determine what else needs to be done to have volunteers perform their functions well and happily.

Ways to Collect Information

- Written participant evaluation
- Reflection exercise at end of training where participants share what they have learned and what else they need
- Participant check-in interview
- Participant performance in volunteer position
- Other:

Kirkpatrick's Four Levels of Evaluating Training

Donald Kirkpatrick created what is still one of the most widely used approaches to evaluating training, even though it was first developed in 1959. At the time, he was a professor of marketing at the University of Wisconsin. His four levels of evaluation are:

Level 1: Reaction

A measure of satisfaction. This level answers questions such as: "Were participants pleased? What do they plan to do with what they learned? "

Level 2: Learning

A measure of learning. This level answers questions such as: "What skills, knowledge, or attitudes have changed? By how much?"

Level 3: Behavior

A measure of behavior change. This level answers questions such as: "Did participants change their behavior based on what was learned in the program?"

Level 4: Results

A measure of results. This level answers questions such as: "Did the change in behavior positively affect the organization?"



Tips for Training Busy Staff to Work with Volunteers

By Betty Stallings

From *Training Busy Staff to Succeed with Volunteers: The 55-Minute Training Series*

The following are a few recommendations as you prepare to design and/or select your content:

1. Good training design begins with the assessment of the learning needs of anticipated participants. Your content should be built around the gap between what staff needs to know to be successful and what they already know.
2. After the topic(s) are chosen, it is important to specify key learning objectives that deal with knowledge, skills, and attitudes. Learning objectives basically describe what a participant should be able to know or do or feel at the conclusion of the seminar.
3. Select a moderate level of content. There is a tendency to throw in everything you know about a given topic, and the result is a rushed session where little is retained. The best approach to developing a lean curriculum is being selective - choosing the "need-to-know" before the "nice-to-know." When the content level is kept moderate, the trainer can lead activities that experiment with and reflect upon what is being presented.
4. Provide printed resources that will be utilized and/or shared (e.g., handouts, activity sheets, training manuals for participants, in-house forms, information to be brought by participants). These resources greatly enhance learning if they are well done and tie closely to the presentation. If handouts are distributed and no acknowledgment is given to them, they are infrequently read or utilized.

A typical sequence for training is:

Beginning of training:

- Purpose of session
- Learning objectives and key concepts
- Climate setting, ice breakers

Middle of training:

Content developed around key concepts, done in logical fashion and building from theory to application, knowledge to skill. Selected training activities/learning methods vary from passive to participant phases:

- Lectures
- Role play
- Slides
- Flip chart
- Group Dyad activities

Training & Orientation

Achieving Service Excellence



- Panel discussions
- Brainstorming
- Case study
- Dramatization

Take occasional breaks and/or energizers if session lasts longer than 90 minutes.

End of training:

- Review and summarize content
- *Have participants process their experience ("What will I do differently when I return to my job?")
- Conduct an evaluation to get a sense of the perceived value of the session to the participants. True evaluation occurs if you can arrange a follow-up form whereby actual impact can be recorded. For example: "As a result of the workshop in interviewing, I now see its value and have arranged to give half-hour screening interviews to volunteer candidates in my department."

Excerpted from *Training Busy Staff to Succeed with Volunteers: The 55-Minute Training Series*, by Betty Stallings, 2006, Betty Stallings and Associates.

Found in the Energize Website library at: <http://www.energizeinc.com/art.html>

Training & Orientation

Achieving Service Excellence



Resources

Energize Inc.

<http://www.energizeinc.com/art/subj/train.html>

National Resource Center – Corporation for National and Community Service

<http://nationalserviceresources.org/volunteer-member-staff-management/training>

<http://nationalserviceresources.org/volunteer-member-staff-management/orientation>

Free Management Library

<http://www.managementhelp.org/staffing/outsrcng/volnteer/volnteer.htm#anchor1269832>

Training Busy Staff to Succeed with Volunteers: The 55-Minute Staff Training Series Betty Stallings

<http://www.energizeinc.com/store/4-109-E-1>

References

Campbell, Katherine Noyes, and Susan J. Ellis. (1995). *The (Help!) I-Don't-Have-Enough-Time Guide to Volunteer Management*. Philadelphia, PA: Energize, Inc.

Connors, T. Daniels, ed. (2001). *The Nonprofit Handbook*. New York, NY: John Wiley and Sons.

Lee, Jarene Frances, with Julia M. Catagnus. (1998). *What We Learned (the Hard Way) About Supervising Volunteers: An Action Guide for Making Your Job Easier*. Philadelphia, PA: Energize, Inc.

Rick Lynch. (1980). *Training Volunteers: Using the Right Training Method*. in *Voluntary Action Leadership, Fall 1980*. Washington, DC: Points of Light Foundation.

McCurley, Steve H., and Rick Lynch. (2006). *Volunteer Management: Mobilizing All the Resources of the Community*. Downers Grove, IL: Heritage Arts Publishing.

McCurley, Steve H., and Sue Vineyard. (1986). *101 Ideas for Volunteer Programs*. Downers Grove, IL: Heritage Arts Publishing.

McCurley, Steve, and Sue Vineyard. (1986). *101 More Ideas for Volunteer Programs*. Downers Grove, IL: Heritage Arts Publishing.



Maximizing the Volunteer Experience

Sample Volunteer Work Plan

Placement Goal:

To organize an after school enrichment program for children 6-12 years of age.

Objective 1:

Locate and secure a program site that meets specified criteria.

Action Steps:

1. Create a list of criteria for program site.
2. Get site criteria list approved by supervisor.
3. Identify prime locations based on criteria.
4. Develop a spreadsheet to identify benefits and drawbacks to each site. Get supervisor feedback to narrow options down to five potential sites.
5. Conduct site visits to further narrow down site options.
6. Meet with supervisor to make final decision.
7. Contact site.
8. Secure a signed Memorandum of Understanding (MOU).

Time Frame:

Site secured according to the standards of success before a specified date.

Supervision:

Supervised by John Doe. John Doe and volunteer will meet every Tuesday at 10 a.m. for project status updates.

Resources:

Telephone, Computer, Memorandum of Understanding



Dealing with Difficult Volunteers

Guidelines to follow when reprimanding a volunteer or giving constructive criticism:

- Don't wait and give several criticisms to a volunteer all at once. Focus your discussion on the one item that has been brought to your attention.
- Be specific. Give the volunteer examples of when they have acted in a way that is contrary to your expectations and the procedures set down for them during orientation.
- Remember that you are giving them feedback on specific actions. Do not comment on the volunteer's attitudes or motivations, but rather on his or her specific behavior.
- Put the reprimand in perspective. If the volunteer has been an asset in other areas in the past, remind them of that good performance and let them know you can still move forward in a positive manner.
- Set a time to once again meet and determine if the behavior has changed. This will give you an opportunity to give positive feedback if the volunteer has amended their actions or take further steps if they have not.

Source: McCurley, Steve and Sue Vineyard, *Handling Problem Volunteers* (Downers Grove: Heritage Arts) 1988.

Suggested ways to open the conversation:

- "I have something I'd like to discuss with you."
- "I would like to talk about what just happened. Do you have a few minutes?"
- "I think we have different perceptions about _____."
- "I'd like to see if we might reach a better understanding about _____."



Resources

Recognition

100 Ways to Recognize Volunteers

<http://www.maineservicecommission.gov/docs/A.7.%20100%20Ways%20to%20Recognize%20Volunteers.pdf>

Volunteer Recognition Ideas

<http://www.energizeinc.com/ideas.html>

Volunteer Recognition – Energize Inc.

<http://www.energizeinc.com/art/subj/recogn.html>

139 Ways to say Thank You

http://www.fourh.purdue.edu/downloads/ext_ed/pdf/131and139.pdf

Supervision

Volunteer Supervision – Energize.Inc.

<http://www.energizeinc.com/art/subj/super.html>

Becoming a better Supervisor: A Resource Guide for Community Service Volunteers

<http://www.nationalserviceresources.org/becoming-supervisor>

Supervising Volunteers – Free Management Library

<http://managementhelp.org/staffing/outsrcng/volnteer/volnteer.htm#anchor1270094>

Volunteer Work Plan

Work Plan Library

<http://nationalserviceresources.org/star/workplan>

Diversity

Cultural Competence and Community Building - The Community Toolbox

<http://ctb.ku.edu/en/tablecontents/index.htm#h>

Difficult Volunteers

Terminate or Tolerate: Dealing with a Problem Volunteer

<http://srdc.msstate.edu/03mm/ppts/groff.pdf>

Giving and Providing Feedback

<http://4h.uwex.edu/resources/mgt/documents/GivingandProvidingFeedback.pdf>

A Few Pointers on the Unpleasant Topic of Firing Volunteers

<http://www.utexas.edu/lbj/rgk/serviceleader/leaders/firing.php>

Supervision



Maximizing the Volunteer Experience

Books and Articles

Marlene Caroselli, *Hiring & Firing: What Every Manager Needs to Know*, SkillPath Publications: Mission, KS. 1993.

Linda Graff, *By Definition: Policies for Volunteer Programs*; GRAFF AND ASSOCIATES: Dundas, CA. 1997.

Jarene Frances Lee and Julia M. Catagnus, *Supervising Volunteers: An Action Guide*, ENERGIZE Inc:Philadelphia, PA, 1999.

Marilyn MacKenzie, *Dealing with Difficult Volunteers*, VMSystems: Downers Grove, IL. 1998.

Steve McCurley and Sue Vineyard, *Handling Problem Volunteers*, VMSystems: Downers Grove, IL. 1998.



Ten Steps to Evaluation

- 1. Convene an Evaluation Team:** How many people are needed? Who should be involved? What skills are needed? How often should the group meet?
- 2. Identify your Purpose:** Why you are conducting an evaluation and what decisions you want to make upon completion of the evaluation.
- 3. Connect Evaluation Efforts to Organizational Planning:** How does the evaluation connect with the organization's goals, objectives or tactics?
- 4. Identify/Allocate Resources:** What resources do you have to support the planning and implementation of the evaluation?
- 5. Identify Stakeholders:** Who will the final summary or report be written for? Who has an interest in the evaluation results?
- 6. Identify Audience:** Who are you evaluating and why?



7. Design your Evaluation:

- a. Determine the type of evaluation you will use. Process-based, goals-based and/or outcomes-based.
- b. Identify the information needed
- c. Identify evaluation method(s)
- d. Develop instrument
- e. Pilot or test

8. Conduct Evaluation: Collect the data as planned.

9. Analyze Results and Interpret Data: The data sorting, analyzing and interpretation process will vary based on the type of data you have collected.

10. Communicate Results: Report results to key stakeholders.



Improving Results Using Data & Feedback

Stakeholder Priorities

Use the space below to document insights around the priorities of the following stakeholders.

Stakeholder	General Priorities	Notes
Board Member		
Clients/ Participants		
Community Member		
Executive Director		
Grantor/Funder		
Volunteer Manager		
Other Staff performing duties of Volunteer Manager		



Evaluation Types Worksheet

Scenario: The purpose of the Grand View Food Bank Volunteer Program is to coordinate the distribution of donated food to those in need, through the efforts of volunteers. This year the Grand View Food Bank created an organic community garden project whereby all the food cultivated in the garden would be given to at least 3,000 families throughout the year. They want to teach at least 500 families how to garden at home. They also want to increase the quality of life of at least 75 percent of their clients as reported using a well developed instrument.

1. What type of program evaluation would you use if you are trying to find out if in fact you provided healthy food from the organic garden to at least 3,000 families?

Answer:

2. What type of program evaluation would you use if you were trying to find out how families were finding out about the community garden project and what form of communication was most effective?

Answer:

3. What type of program evaluation would you use if you were trying to verify that 75 percent of the families served reported an increase in quality of life?

Answer:



Improving Results Using Data & Feedback

Data Collection Methods

The grid below shows the pros and cons of various data collection methods, so that you can choose the method that best meets your needs.

	Questionnaires, Surveys, checklists	Interviews	Documentation Review	Observation	Focus Groups
Advantages					
Anonymous It's possible for evaluators not to know who the actual respondents are.	✓		✓		
Cost-effective Can collect data from many individuals with little administration time.	✓		✓		
Easily administered Data can be collected by relatively untrained individuals.	✓		✓		
Generalizable Data are representative of entire population, if sampled and collected correctly.	✓	✓		✓	
Quantitative Collects data that can easily be presented numerically.	✓	✓		✓	
Probing Follow-up questions can be asked, for greater depth.		✓			✓
Rich Collects emotions, subtleties, stories and reasoning.		✓			✓

✓ This method has this advantage.



Improving Results Using Data & Feedback

Surveys/ Questionnaires

Overall Purpose	Advantages	Challenges	Comments
Use when you need to quickly and/or easily get lots of information from people in a non threatening way	<ul style="list-style-type: none">• Can complete anonymously• Inexpensive to administer• Easy to compare and analyze• Administer to many people• Can get lots of data• Many sample questionnaires already exist	<ul style="list-style-type: none">• Might not get careful feedback• Wording can bias volunteer's response• Are sometimes impersonal• May need sampling expert (surveys)• Doesn't get full story	<p>Surveys use data collection instruments, like questionnaires, to collect data from a sample of the relevant population, or from the entire population (a census). Surveys are used extensively in evaluation - perhaps overused - because of their flexibility to gather data on almost any issue. When done correctly, surveys are an efficient and accurate means of collecting data, but they can be difficult to construct, and may yield low participation (response rate). A low response rate hinders the reliability and validity of the information. The evaluator does not know if the non-respondents would have answered differently, so including a non-respondent analysis is often important to see who actually responded or not.</p>

 Notes



Interviews

Overall Purpose	Advantages	Challenges	Comments
Use when you want to fully understand someone's impressions or experiences, or learn more about their answers to questionnaires	<ul style="list-style-type: none">• Get full range and depth of information• Develops relationship with volunteer• Can be flexible with volunteer	<ul style="list-style-type: none">• Can take much time• Can be hard to analyze and compare• Can be costly• Interviewer can bias volunteer's responses	Interviews are essentially conversations between the evaluators and their respondents. An interview is selected when interpersonal contact is important, when opportunities for follow-up of interesting comments are desired, when the topic is complex and requires explanation and interaction, or when cultural, educational, or language barriers are present. The use of interviews as a data collection method assumes that the participants' perspectives are meaningful and knowable. The quality of information obtained is largely dependent on the interviewer's skills and personality.

Notes



Improving Results Using Data & Feedback

Documentation review (e.g. data already collected)

Overall Purpose	Advantages	Challenges	Comments
When you want an impression of how the program operates without interrupting the program. Includes review of applications, finances, memos, minutes, etc.	<ul style="list-style-type: none">• Get comprehensive and historical information• Doesn't interrupt program or volunteer's routine in program• Information already exists - few biases about information	<ul style="list-style-type: none">• Often takes much time• Information may be incomplete• Need to be quite clear about what looking for• inflexible means to get data; data restricted to what already exists	Documents are very handy in program evaluation. Existing (archival) records often provide insights that cannot be observed or noted in another way, if the documents are accessible and accurate. Examining records requires that the data collector have a very clear idea of what information is needed, because there will likely be plenty of other interesting information to distract the unorganized reviewer.

Notes



Observation

Overall Purpose	Advantages	Challenges	Comments
Use to gather accurate information about how a program actually operates, particularly about processes	<ul style="list-style-type: none">• View operations of a program as they are actually occurring• Can adapt to events as they occur	<ul style="list-style-type: none">• Can be difficult to interpret seen behaviors• Can be complex to categorize observations• Can influence behaviors of program participants• Can be expensive	Observations can be useful in determining how the program is implemented and provides opportunities for identifying unanticipated outcomes. Observations can answer questions on whether or not the program is being delivered and operated as planned. By directly observing operations and activities, the evaluator can enter into and understand the situation and context. However, observation (obtrusive and unobtrusive) can be expensive and time consuming. Depending on the situation, the observer may need to be a content expert to accurately interpret the observations.

 Notes



Improving Results Using Data & Feedback

Focus Groups

Overall Purpose	Advantages	Challenges	Comments
Use to explore a topic in depth through group discussion (e.g., about reactions to an experience or suggestion, understanding common complaints, etc.) Useful in evaluation and marketing	<ul style="list-style-type: none">• Quickly and reliably get common impressions• Can be efficient way to get much range and depth of information in short time• Can convey key information about programs	<ul style="list-style-type: none">• Can be hard to analyze responses• Need good facilitator for safety and closure• Difficult to schedule 6-8 people together	Groups (such as focus groups) combine elements of both observation and interviewing. A focus group is an interview with a gathering of 8 - 12 people, but uses group interaction to generate data and insights that would be unlikely to emerge in individual interviews. The technique includes observation of group dynamics, and insights into the respondents' behaviors and attitudes. Originally used as a market research tool to learn the appeal of various products, the focus group method has been adopted by other fields as a way to gather data on a given topic.

 **Notes**



Resources

Evaluation Methods

Focus Groups

Australian Museum. *How do I conduct a focus group?*
<http://australianmuseum.net.au/How-do-I-conduct-a-focus-group>

McNamara, Carter. 2008. *Basics of Conducting Focus Groups*.
<http://managementhelp.org/evaluatn/focusgrp.htm>

Rennekamp, Roger and Martha Nall. *Using Focus Groups in Program Development and Evaluation*. <http://www.ca.uky.edu/Agpsd/focus.pdf>

Interviews

Kiernan, Nancy Ellen (2002). *Volunteer Interviewers in a Phone Interview: What To Consider*. Tipsheet #65, University Park, PA: Penn State Cooperative Extension.
<http://www.extension.psu.edu/evaluation/pdf/TS65.pdf>

Carolyn Boyce, Carolyn and Palena Neale. 2006. *A Guide for Designing and Conducting In-Depth Interviews for Evaluation Input*
http://www.pathfind.org/site/DocServer/m_e_tool_series_indepth_interviews.pdf?docID=6301

Observation

Evaluation Trust. *Observation as an Evaluation Technique*.
<http://www.evaluationtrust.org/tools/observe>

Using Direct Observation Techniques http://pdf.usaid.gov/pdf_docs/PNABY208.pdf

Portfolio/Journal Assessment

Teacher Vision. Portfolios. <http://www.teachervision.fen.com/assessment/teaching-methods/20153.html>

Writing Survey Questions

Conducting a Survey in Your Community. A 9-step online guide
<http://www.communitydevelopment.uiuc.edu/commsurvey/>

Conducting Surveys. The Community Tool Box. Gives explanations, examples, related topics, tools and checklists. http://ctb.ku.edu/en/tablecontents/section_1048.htm



Improving Results Using Data & Feedback

***Creating Good Interview and Survey Questions.* Gives examples of poorly worded questions and revised questions. <http://owl.english.purdue.edu/owl/resource/559/06/>

Evaluation Handbook. W.K. Kellogg Foundation. Though written for grantees, it is an excellent reference handbook.

<http://www.wkkf.org/~media/10BF675E6D0C4340AE8B038F5080CBFC.ashx>

***Resource Center.* Zoomerang. Various webinars, articles, response rates, tips, and whitepapers to help build better surveys. <http://www.zoomerang.com/resource-center/>

***Smart Survey Design,* Survey Monkey. A 35-page guide that includes good vs. bad questions, question intent, relevancy, etc.

<http://s3.amazonaws.com/SurveyMonkeyFiles/SmartSurvey.pdf>

Survey Design. Survey System.

Sections on Establish the goals of the project, Determine your sample, Choose interviewing methodology, Create your questionnaire, Pre-test the questionnaire

<http://www.surveysystem.com/sdesign.htm>

Wikipedia.

Statistical survey. Describes standardization, advantages and disadvantages of surveys, questions and response formats, modes of data collection, methods to include response rates. http://en.wikipedia.org/wiki/Statistical_survey

Questionnaire construction. Describes issues, types of questions, sequencing.

http://en.wikipedia.org/wiki/Questionnaire_construction

Online Survey

SurveyMonkey - www.surveymonkey.com/ free for 10 questions, 100 responses. Paid subscriptions available.

Zoomerang - www.zoomerang.com/ Free for 30 questions, 100 responses. Paid subscriptions available.

Infopoll - <http://www.infopoll.com> 50% academic and non-profit discounts

SuperSurvey - <http://www.supersurvey.com/> Basic free plan. Paid subscriptions available.

Esurveys - <http://www.esurveys.com/> \$12-\$36/month.

General

Introduction to Evaluation

http://ctb.ku.edu/en/tablecontents/chapter_1036.htm