

# The Essentials

## Best Practices for Volunteer Resource Management

Bet Savich & Lucy Schaich  
City of Bloomington Volunteer Network

## It's not B-I-N-G-O It's M-I-N-G-L

- Let's Mingle!
1. Find the people associated with the organizations on the card.
  2. Get their initials.
  3. Fill the card and sign the back for your entry into the prize drawing.

Mix & mingle...play a little "get to know" you MINGLe!  
Meet your fellow attendees - find the person connected to the organization and have them initial that box. Fill the entire card, write your name on the back and turn it in to be eligible for a prize drawing!

M I N G L				
El Centro Comunal Latino	United Way of Bluff and Monroe County	Brown County Art Guild	Kilimanjaro Education Outreach	PALS People and Animal Learning Services
Options	The Salvation Army	College Internship Program	Interfaith Winter Shelter	Area 10 Agency on Aging
STEEN - Southern Indiana Renewable Energy Network	Fourth Street Art Festival	Free Space	El Centro Comunal Latino	Brown County Humane Society
Crisis Pregnancy Center & Harrah House	Area 10 Agency on Aging	My Sister's Closet	The Volunteer Network	Bread of Life Soup for the Soul
Monroe County History Center	Center for Sustainable Living	Hoosier Hills Food Bank	Global Gifts	Brown County Art Guild

## Meet and Greet

Share the following:

- Name
- Organization
- One sentence explaining: Why did you choose your picture?

Let's keep it snappy!



City of Bloomington Volunteer Network  
The Essentials Training 2011

## Today's Objectives

Learn about the essential areas of volunteer resource management



## What does it mean to volunteer?

To volunteer is to choose to act  
in recognition of a need,  
with an attitude of social responsibility and  
without concern for monetary profit,  
going beyond one's basic obligation.



*Adapted from By the People: A History of Americans as Volunteers  
by Susan J. Ellis and Katherine H. Noyes, 1990, Jossey-Bass*

## Volunteering in America Report

The 2010 report shows that volunteering is holding steady

- The national average is a volunteer rate of 26.8%
- The Indiana rate is 29.5%



Source: Volunteering in America Report <http://www.volunteeringinamerica.gov>

# Volunteering in America Report

*Top Volunteer State*

UTAH – 1<sup>st</sup> Place

*Hoosier Volunteers Rate Where?*

INDIANA – 25<sup>th</sup> Place

*Lowest Ranking Volunteer State*

NEW YORK - 51<sup>st</sup> Place

Source: Volunteering in America Report <http://www.volunteeringinamerica.gov>

## In Indiana...

- 1.5 million volunteers in 2009
- 192.1 million hours served
- 39.1 hours per resident

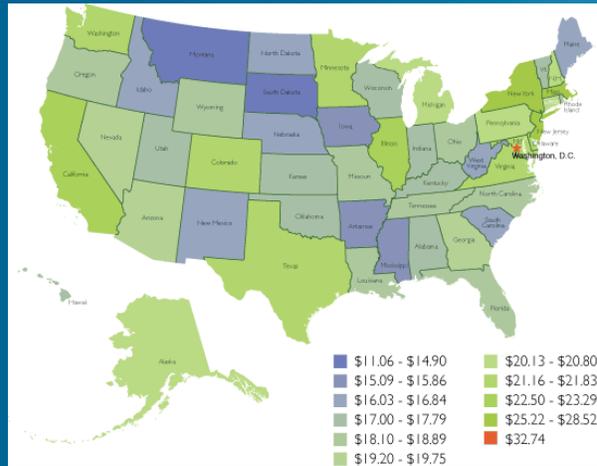


Source: Volunteering in America Report <http://www.volunteeringinamerica.gov>

## Value of Volunteer Time

US:  
\$21.36/hr (2010)

Indiana:  
\$17.61/hr (2009)



## Value of Volunteer Time

Tracking volunteer time can boost your bottom line!

### Why Track Volunteer Time?

- » Recognize your volunteers by valuing their time
- » Improve your financial statement presentations  
volunteer inputs = measure of organizational effectiveness
- » Match financial requirements for funding
- » Reduce Liability
- » Show the value of your program to your organization and the community

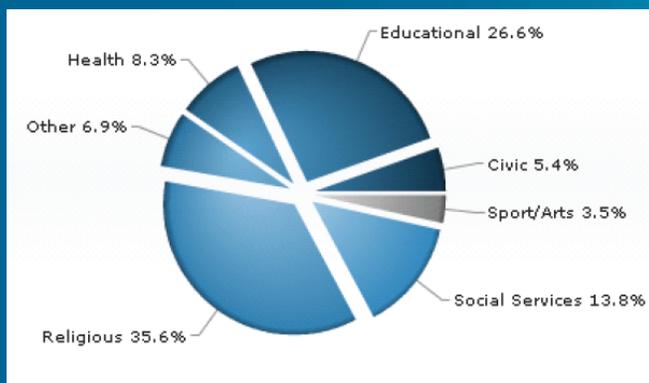
## Trend #1: Higher volunteer rates for women.

- especially women ages 45-54
- married women
- employed women, especially those working full-time



Source: Volunteering in America Report <http://www.volunteeringinamerica.gov>

## Where are people volunteering?



2007-2009 Source: Volunteering in America Report 2009 <http://www.volunteeringinamerica.gov>

## Trend #2: Partnering with the faith-based community.

- great resources for nonprofits seeking volunteers.
- most popular organizations through which volunteers serve.
- Volunteers serving through faith-based organizations are the most likely to continue serving.



Sherwood Oaks Christian Church CareFest volunteers

Source: Volunteering in America Report  
<http://www.volunteeringinamerica.gov/assets/resources/VolunteeringInAmericaFaithOrganizations.pdf>

## Trend #3: Poor volunteer management = poor volunteer retention

- Due to poor management of volunteers, more than one-third of those who volunteer one year do not donate their time the next year at any non-profit.



Source: Corporation for National and Community Service The New Volunteer Workforce (2009)  
<http://www.volunteeringinamerica.gov/assets/resources/TheNewVolunteerWorkforce.pdf>

## More Volunteer Trends

- Virtual volunteerism
- Volun-tourism
- Corporate volunteering
- Skills-based volunteering
- Service learning
- School service requirements
- Community restitution
- Family volunteering
- Serve America Act
- United We Serve
- Campaigns to make volunteering a priority  
(e.g., iParticipate, Give a Day Get a Disney Day)

## Technology

- [bloomington.in.gov/volunteer](http://bloomington.in.gov/volunteer)
- [Volunteersolutions.org](http://Volunteersolutions.org)
- [Volunteermatch.org](http://Volunteermatch.org)
- [Idealist.org](http://Idealist.org)
- [Serve.gov](http://Serve.gov)
- You Tube
- Facebook
- Twitter
- MySpace



facebook



## Action Capture Sheet

What might you start doing, or  
do differently, in terms of. . .  
**VOLUNTEER TRENDS and TRACKING?**

## Levels of Volunteer Engagement



## Characteristics of Organizations that Successfully Engage Volunteers

1. Lay the Foundation through Mission and Vision
2. Combine Inspiring Leadership with Effective Management
3. Build Understanding and Collaboration
4. Learn, Grow and Change



## Characteristics of Organizations that Successfully Engage Volunteers

1. Lay the Foundation through Mission and Vision



## Lay the Foundation through Mission and Vision

- Are volunteers seen as valuable human resources?
- Do they **directly contribute** to the achievement of the **organization's mission**, not just primarily as a means to obtaining financial or other material resources?
- Is there a clear, positive and widely-shared vision



## Characteristics of Organizations that Successfully Engage Volunteers

### 2. Combine *Inspiring* Leadership with Effective Management



## Characteristics of Organizations that Successfully Engage Volunteers

### 3. Build Understanding and Collaboration



## Characteristics of Organizations that Successfully Engage Volunteers

### 4. Learn, Grow and Change



## Benefits of Involving Volunteers

What are some of the Benefits for Organizations?

- Why involve volunteers?
- What are the advantages to working with volunteers that you wouldn't get with staff?
- If you had all the money your organization needed, for what reasons would you still involve volunteers?
- What would happen if volunteers were not involved in your organization?

## Challenges of Involving Volunteers

What are some of the Challenges?

- for Organizations that host volunteers

Why do people volunteer?



Two Main Reasons People Volunteer

They were  
ASKED



They want to do something  
good for others



Why do people stop volunteering?



Why do people stop volunteering?

#1 Reason

They feel that the organization wasn't well managed and their skills and time were not being utilized well.



## Motivational Quiz



## McClelland's Theory of Social Motivators

### Motivations

Achievement

Affiliation

Influence

## What's Your Motivation?

Use the Motivational Analysis Key to score your quiz.



## Achievement-motivated

Strive for excellence, their personal best, they are calculated risk takers, restless, innovative, will do what they say, task oriented, work well by themselves, love challenges, and they like to problem solve.



## Affiliation-motivated

Most happy in situations where there is a strong social component, they enjoy mutual friendship, want to be liked and accepted, they strive for warm friendly relationships, and they appreciate interaction on a personal level.



## Influence-motivated

Comfortable in a leadership role, they are decision-makers, they view themselves as capable, independent workers, they have the need to impact and influence others.



## Action Capture Sheet

Now that you understand volunteers better, is there anything you want to start doing, or do differently? . . .

## 15 Minute Break



## 5 Elements of Volunteer Management



## Conducting a Needs Assessment

Why?

How?

## Conducting a Needs Assessment

What questions could you ask STAFF to identify unmet needs?

## Mission

A one- or two-sentence statement that outlines the specific reason for which the organization exists.

A Food Bank example:

Mission:

*To provide nutritional food and nutrition education to people who are poor.*

## Vision

A detailed description of the future the organization is trying to create.

A Food Bank example:

Vision:

*We envision a community where all residents have access to affordable and healthy food.*

## Purpose

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

A Food Bank Volunteer Program example:

Purpose:

*To maintain the quality of and coordinate the distribution of donated food to those in need in the community, through the efforts of volunteers*

## How Might a Purpose Statement be Used?

- To engage/empower current volunteers
- To recruit more volunteers
- To demonstrate value
- To help the volunteer manager prioritize and stay focused
- To use in outreach
- To create effective marketing
- Other uses?

## Action Capture Sheet

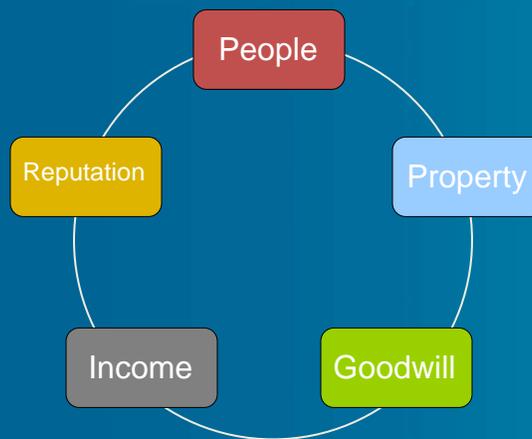
What might you start doing, or do differently, in terms of. . .

**NEEDS ASSESSMENT and  
PURPOSE STATEMENT?**

## Introduction to Risk Management

- Identification, assessment and prioritization of risk
- Action to minimize, monitor or control the effects
- Plans or procedures to control potentially harmful situations

## What's at Risk?



## 3 Things to Remember about Risk Management

1. There are inherent risks in running a volunteer program.
2. Volunteer positions do not all have the same level of risk
3. Once the risk factors are identified in a volunteer position, preventive strategies should be incorporated into all aspects of that position.

## Control the Risks

Create a plan for managing risks.

- Avoid the risk
- Reduce the negative effect
- Accept some or all of the consequences
- Transfer the risk

## Appropriate Volunteer Roles

Are these **Acceptable** / **Questionable** / **Inappropriate**

- Carry 50-pound cases of food in a warehouse
- Counsel delinquent youth
- Lead a youth group to clean up a neighborhood
- Type reports for volunteer managers or other staff
- Process payroll checks for staff
- Take a dog to visit prisoners at the state prison
- Sell tickets at a symphony concert
- Give advice on how to run a program as part of an advisory council
- Administer drugs to clients

## Key Questions to Ask

- What do our volunteers do? (Or what will they do?)
- What could go wrong?
- How probable is that?
- How serious an issue would it be?
- How can we diminish the probability or protect ourselves?
- Can we still ask a volunteer to do this?

## Volunteer Program Resources

- What resources are needed to successfully manage your volunteer program?
- What items have a direct cost related to them?
- What are other resources that might have indirect costs?

## Advocate for Resources

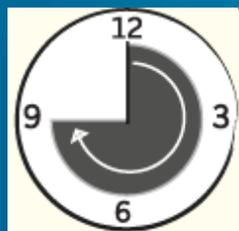
How can you advocate for your program  
to get the resources you need  
to be successful?

## Action Capture Sheet

What might you start doing, or  
do differently, in terms of. . .

**PLANNING?**

## Lunch Break



**45 min**



## 5 Elements of Volunteer Management



## Volunteer Position Descriptions

### Activity

Title  
Purpose  
Location  
Key Responsibilities

Sample Description:

## Rate Your Volunteer Program

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



## What is Volunteer Recruitment?

The process of matching an organization's needs with a volunteer's interests and skills

Volunteer Recruitment Step 1:  
**Develop a Volunteer Position Description**

**Activity**

Title  
Purpose  
Location  
Key Responsibilities

Sample Description:

Volunteer Recruitment Step 2:  
**Develop a Recruitment Plan**

**General  
&  
Targeted**

## General Recruitment

- Identify Benefits and Features
- Craft a Powerful Message
- Design a Communication Strategy



## Target Your Market

### Activity

- List as many volunteer populations which you might be targeting

## Circle of (Recruitment) Resources

- What are the resources within your organization?
- What are the resources that surround your organization?
- What groups share ideology?
- Write down everything you see
- Start with the closest to you and keep going in widening circles

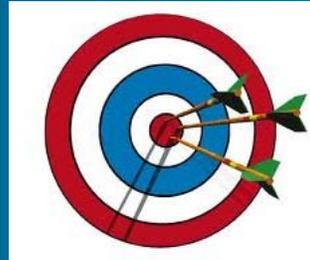


## Generational Targeting

	Silent Generation (1922-1945)	Baby Boomer (1946-1964)	Generation x (1965-1980)	Generation Y (1981-2000)
Work Ethic and Values	Hard work, respect authority, sacrifice, duty before fun	Workaholic, work efficiency, quality, question authority, personal fulfillment	Want structure and direction, skeptical, self-reliant	What's next, multitasking, tenacity, entrepreneurial, tolerant, goal oriented
Messages that Motivate	Your experience is respected	You are valued and needed	Do it your own way, forget the rules	You will work with other bright people
Interactive Style	Individual	Team player, loves to have meetings	Entrepreneur	Participative
Communications	Formal memo	In person	Direct Immediate, Email	Facebook, Text
Leadership Style	Directive	Consensual	Everyone is the same, challenge others, ask why	TBD
Feedback and Rewards	No news is good news, satisfaction in a job well done	Don't appreciate it, money, title recognition	Freedom, How am I doing?	Whenever I want it, meaningful work

## Targeted Recruitment

1. Target Your Market
2. Identify Benefits/Features & Fears/Barriers
3. Craft a Powerful Message
4. Design a Communication Strategy



## Craft a Powerful Message

- Share benefits and feature
- Keep the message simple
- Make the message attractive

## Design a Communications Strategy

- Different audiences require different communication strategies
- Be strategic about your communication

## Online Recruiting Resources

- Make the most of your online recruitment by posting your opportunities on the Volunteer Network website



The screenshot displays the 'VOLUNTEER NETWORK' website for the City of Bloomington. The page features a navigation menu with links for Home, Search, Spotlight, Calendar, Disaster, Agencies, Opportunities, Community Wish List, and a 'Welcome Lucy' message. A 'Local Statistics' section shows 265 Opportunities, 207 Agencies, 12,803 Hours, and 1,400 Volunteers. A 'QUICK SEARCHES' section lists various categories like Health, Education, Environment, and Arts. A 'Find A Volunteer Opportunity' search bar is visible at the bottom, with a dropdown menu set to 'Select Issue / Interest' and a 'Search' button. An 'Advanced search' link is also present.

## More Online Recruitment Resources

- [www.bloomington.in.gov/volunteer](http://www.bloomington.in.gov/volunteer)
- [www.craigslist.org](http://www.craigslist.org)
- [www.facebook.com](http://www.facebook.com)
- blogs



twitter



United We Serve  
SERVE.GOV

facebook



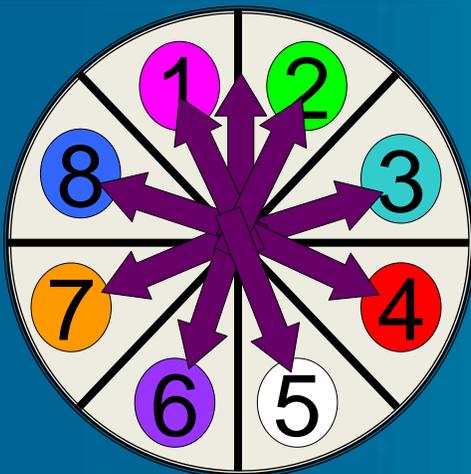
- [www.serve.gov](http://www.serve.gov)
- [www.youtube.com](http://www.youtube.com)
- [www.volunteermatch.org](http://www.volunteermatch.org)
- [www.idealists.org](http://www.idealists.org)

## Volunteer Recruitment Step 3: Screen Volunteers

What are some factors that determine  
the intensity of your screening?

# Wheel of Fortune

## Guess that Screening Technique



# Criminal Background Checks

## Know your options!

Volunteer Network Member Discounted Rate:

### Program Packages:

There are two basic packages available. You will also have access to several à la carte options such as Credit Reports and Motor Vehicle Reports which may be useful to your program. (pricing is available online).

#### Package #1: \$3.00

- SSN Verification with address history
- Nationwide Criminal Super Search\*
- Nationwide Sex Offender Registry

#### Package #2: \$7.95

- SSN Verification with address history
- Nationwide Criminal Super Search\*
- Nationwide Sex Offender Registry
- One Single County Criminal search
- Terrorist Search

Background Check Pricing (2011)	
Type	Price
<b>LOCAL</b>	
<b>State of IN Public Records Criminal &amp; Citation Case Records</b> http://www.in.gov Provides FREE access to the same information that the City and County report (see below)	<b>FREE</b>
<b>Sex Offender Watch (local, state &amp; national)</b> Monroe County Sheriff's Dept. www.icrnewatch.net/search2.php?Agency=CIN45655 Indiana Sex and Violent Offender Registry: www.icrnewatch.net/indiana.php National Sex Offender Public Website: www.nsopr.gov	<b>FREE</b>
<b>Child Abuse Registry (local, state &amp; national)</b> There is a multiple process to gain access to records. Contact the Child Protective Services office directly to request a check. Monroe County (Region 12) Address: 1717 W. 3rd St., Bloomington, IN 47404. Phone: 330-6921. Office Hours: 8AM-4:30PM (www.in.gov/accu/2272.htm)	<b>FREE</b>
<b>Monroe County Criminal History Search</b> Requires signed release form (can be your own form) including Name, DOB and SSN. There is a 24hr turnaround. Results can be picked up 100 North College Ave) or faxed to you. (812) 349-2244 / (812) 349-2742 *Fee exemption: FREE for nonprofits located within the County limits, but outside of the City limits.	<b>\$7.00</b>
<b>Bloomington City Criminal History Search</b> Source: Bloomington Police Dept. Download form online (http://usa.gov/criminalhistorycheck) or pick up from the office (201 S. 3rd St.) Includes Name, DOB and SSN. 24hr turnaround. Results can be picked up or faxed to you. No fee exemptions. (812) 331-4477	<b>\$7.00</b>
<b>Driver License Record / DMV Record Search (local, state)</b> phone: 1-888-88MI411 http://www.in.gov/DMV Create an "enhanced" account online for \$50 one fee. Search for Name, DOB and DUI or SSN. Results show Driver Status, license type, expire date, points, status and remarks and Record Suspension, disqualification, conviction(s).	<b>\$7.50</b>

Volunteer Recruitment Step 4:  
**Match Volunteers**

Application

Interview

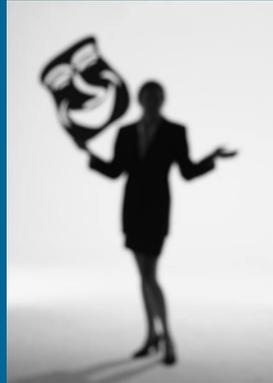
Observation

**Be Sensitive**

**Do not ask questions unrelated to the requirements of the position!**

- Age (unless related to position restrictions)
- Birthplace
- Height and Weight
- Marital Status
- National Origin
- Religious Affiliation
- Race
- Sexual Orientation

## Interview Role Play



What if there is a disconnect?



## Supervision Scenarios

- If reasonable, think about in terms of your own organization
- What supports can you give?
- What challenges do you see?

## Action Capture Sheet

What might you start doing, or  
do differently, in terms of. . .  
**RECRUITING AND PLACING?**

## 15 Minute Break



## 5 Elements of Volunteer Management



## Orientation vs. Training

### Orientation

Provides volunteers with information about:

- the organization
- the volunteer program
- how volunteers fit into the mission of the organization

### Training

Provides volunteers with specific:

- knowledge
- Skills
- attitudes they will need to effectively perform specific roles/duties

## Discussion

- What are the consequences of NOT orienting and/or effectively training volunteers?
- Whose job is it to orient and train volunteers?

## Role of the Volunteer Manager



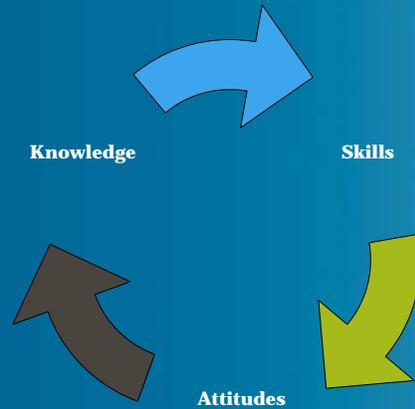
- To train volunteers
- To train staff
- To train the trainers

## Components of Orientation

- Cause
- System
- Social

## Components of Training

The process of providing volunteers with the tools to do the job.



## Effective training must:

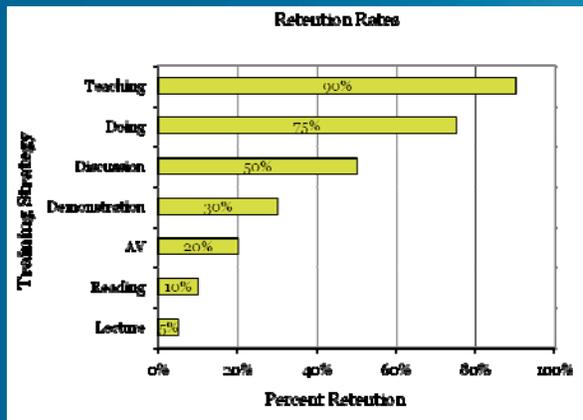
- Be relevant;
- Build on participants' experience
- Be interactive;
- Communicate key lessons through visual, auditory and experiential modes;
- Allow for participant to apply learning;
- Help to solve problems; and
- Demonstrate immediate value.

## Learning Retention Rates

*Tell me, and I will forget;*

*Show me, and I may remember;*

*Involve me, and I will understand.*



## Volunteer Training Design

- Build on participants' experience
- Make training experience interactive
- Communicate through visual, auditory, and experiential modes
- Apply learning

## Design the Training

- Form small groups
- Identify a volunteer position for which the team will design a training.
- Discuss the knowledge, skills and attitude you need for the position, and whether you will recruit for those or train.
- Then focus on the learning activities you will use.

Comments? Questions?

Please stay in your group.

## Deliver the Training

Four principle decisions for training delivery:

1. **When** to deliver the training
2. **Where** you will conduct the training
3. **Who** will deliver the training
4. **How** the training will be conducted

## Assess & Refine the Training

What are ways to  
evaluate the effectiveness  
of volunteer training?

## Action Capture Sheet

What might you start doing, or  
do differently, in terms of. . .  
**ORIENTATION & TRAINING?**

## 5 Elements of Volunteer Management



## Supervising Volunteers

**Step 1:**  
Define and Communicate  
Clear Expectations

**Step 2:**  
Guide and Support Volunteers

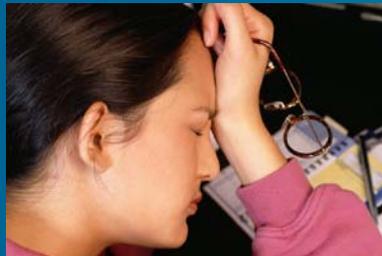
**Step 3:**  
Ensure that Volunteers Feel  
Rewarded and Recognized



## Consequences of Poor Supervision



## Watch Out for Burnout!



Step 1 of Supervising Volunteers:

## Define & Communicate Clear Expectations

Put yourself in a volunteer's shoes:

- You have volunteered at an organization once before, preparing a bulk mailing, and you watched a five-minute orientation video then
- You are now being asked to take on a different project and are about to be given instructions
- Are you comfortable with your directions?

Step 2 of Supervising Volunteers:

## Guide and Support Them

Give them the:

- instructions,
- direction,
- feedback,
- correction,
- information,
- freedom and
- resources they need to perform their functions well.

## Keep Diversity in Mind

- Age
- Abilities
- Education
- Ethnicity
- Family circumstance
- Gender
- Geography
- Marital Status
- Nationality
- Political opinion
- Race
- Religion
- Sexual orientation
- Socio-economic status
- Values

## Volunteer Work Plan

Creating a work plan will help you

- Generate clear outcomes
- Create an agreed upon project time frame
- Manage the expectations of your volunteers
- Clarify standards for success
- Manage the overall volunteer experience

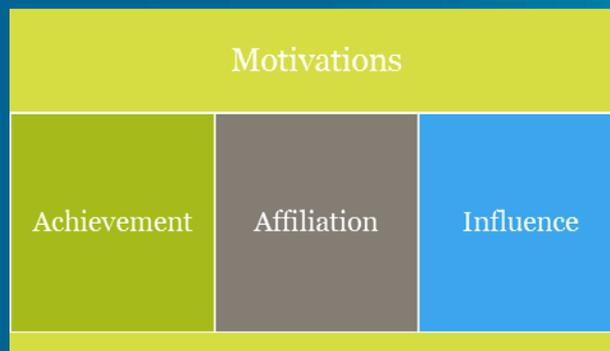
## Elements of a Volunteer Work Plan

1. Overall goal
2. Objective or series of objectives
3. Action steps
4. Time frame
5. Supervision
6. Potential resources (e.g., people, partners, technology and financial)

Step 3 of Supervising Volunteers:

## Reward and Recognize Them

- Ensure that They Feel Rewarded and Recognized



## Myths about Problem Volunteers

- Ignoring problems will make them go away
- No one else notices – it's just me.
- There's good in everyone. We just need to give them time to show it.
- A confrontation will only make things worse
- You can't fire a volunteer

## Action Capture Sheet

What might you start doing, or  
do differently, in terms of. . .  
**SUPERVISION & RECOGNITION?**

## 5 Elements of Volunteer Management



## Evaluation Provides Information

- upon which to base **critical decisions**
- so the organization can better **communicate its story**
- necessary to **continuously improve** services to the community
- necessary to **continuously improve** the volunteer experience
- Better information helps you build program capacity through increased funding and/or improved skills

## Who are your Organization's Stakeholders?

- What types of issues or questions would an individual in each role have?

## Many ways to conduct evaluations

- Questionnaires
- Interviews
- Observation
- Focus Groups
- Other

## Action Capture Sheet

What might you start doing, or  
do differently, in terms of. . .

**PROGRAM EVALUATION?**

Evaluate Us!

## Upcoming – Save the Date!

Volunteer Solutions Orientation – Oct 11

NonProfit Board Certification Training – Oct. 20

Volunteer VIP – November 15

Holiday Wish List – November 25

MLK Day – January 16, 2012

Be More Awards – April 3, 2012

## Thank You for Participating!

[bloomington.in.gov/volunteer](http://bloomington.in.gov/volunteer)

### Contact Info:

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