

The Essentials of Volunteer Management

Today's Trainers:
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Meet and Greet

Share the following:

- Name
- Organization
- What roles do you need volunteers to fill in your organization?
- Why did you choose the picture you did?

2

Today's Objectives:

- Learn about the 6 essential areas of volunteer resource management
- Introduce you to additional sources of information for your program
- Insights into Volunteer Network resources and services

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Understanding Volunteering: *Exploring the Heart of the Volunteer Sector*

5

Objectives

- Understand the current trends in volunteerism
- Identify the elements of volunteer management
- Identify social motivators and their application

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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

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Volunteering in America Report

- The 2010 report shows that volunteering is on the rise nationwide
- Utah in 1st place (44.2% volunteer rate)
- Indiana comes in at 19th place (29.9% volunteer rate)
- New York in 51st place (19% volunteer rate)
- The national average is a volunteer rate of 26.8%



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

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Nationally.....

- 63.4 million volunteers in 2009
- With a dollar value of \$169,000,000,000 (\$169 billion)



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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



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

Volunteering in America

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>

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Specialized Profile Data

Audience	2008 Volunteer Stats	2009 Volunteer Stats
Millennials (born 1982 or later)	21.5%	21.6%
Baby Boomers	29.4%	29.8%
Men	23.2%	23.3%
Older Adults (65+)	23.5%	23.9%
Young Adults (16-24)	21.9%	22%
Parents	33.8%	34.4%

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

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Indiana Volunteering by Special Population and Gender (2007-2009)

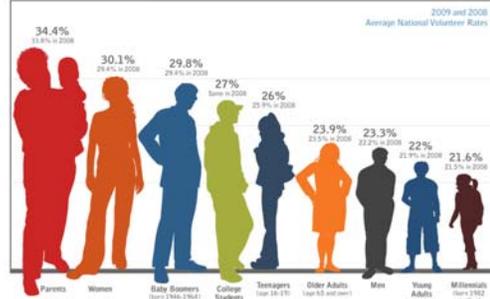
Population	Median Hours	State Rate	National Rate
Baby Boomers	60	34.4 %	29.7 %
College Students	*	29.9 %	26.3 %
Millennials	44	19.4 %	21.2 %
Older Adults	80	26.9 %	23.7 %
Teenagers	*	21.8 %	25.5 %
Young Adults	40	20.7 %	21.6 %
Gender			
Male	52	28.0 %	23.1 %
Female	56	31.6 %	29.6 %

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

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2009 Average National Volunteer Rates

In 2009, 63.4 million Americans volunteered to help their communities, providing 8.3 billion hours of service worth an estimated dollar value of almost \$149 billion (dollar value provided by the Independent Sector).



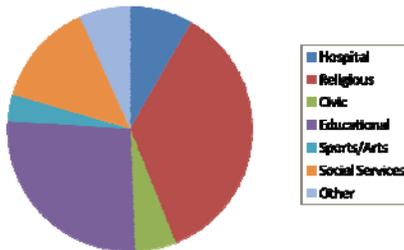
Source: Volunteering in America Report <http://www.volunteeringinamerica.gov>

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Where Are People Volunteering?

Trend #2: Neighbors are helping neighbors.

Volunteering in America 2009



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

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Volunteering in America

Trend #3: It is important to partner with the faith-based community.

- Faith-based organizations are great resources for nonprofits seeking volunteers.
- Religious organizations are the most popular organizations through which volunteers serve.
- They were the *main* organization to serve with for 35.9 percent of America's volunteers between 2006 and 2008.



Sherwood Oaks Christian Church CareFest volunteers

Volunteering in America's Faith based Organizations (2009)
Source: <http://www.volunteeringinamerica.gov/assets/resources/VolunteeringInAmericaFaithOrganizations.pdf>

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Volunteering in America

Trend #4: Poor volunteer management leads to 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.



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

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More Volunteer Trends

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

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Technology

- bloomington.in.gov/volunteer
- 1-800-volunteer.org
- Volunteersolutions.org
- Volunteermatch.org
- Idealist.org
- Facebook
- You Tube
- Twitter
- MySpace



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Five Elements to Volunteer Management



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Activity

- Walk around the room and write down ideas for tasks a volunteer manager might perform under each category
- Please read the items already listed on the chart and do not repeat what's already there



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Organizational Characteristics

- Lay the Foundation through Mission and Vision
- Combine Inspiring Leadership with Effective Management
- Build Understanding and Collaboration
- Learn, Grow and Change



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Lay the Foundation Through Mission & Vision

These characteristics examine the extent to which an **organization** has a core **value** for its existence which is **communicated** with and **shared** by staff and volunteers, and the degree to which there is a **vision** for how **volunteers** fit into the achievement of that **mission**.

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Volunteers are seen as valuable human resources

They **directly contribute** to achievement of the **organization's mission**, not primarily as means to obtaining financial or other material resources.



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A clear, positive and widely-shared vision



Vision for the role of volunteers is:
positive
clearly articulated
widely-shared
and
openly discussed
throughout the organization.

25

Combine *Inspiring Leadership* with *Effective Management*

These characteristics examine the extent to which the organization has administrative **structures** and **clear direction** which will enable it to encourage and facilitate high-impact volunteer involvement.



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Combine Leadership with Management

1. Leaders work in concert to encourage and facilitate high impact involvement.
2. Volunteer management function is well-integrated at all levels and in all parts of the organization.
3. Volunteers are involved in shaping or carrying out the work of the organization at various levels as well as in different departments.



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Combine Leadership with Management

4. Potential barriers to volunteer involvement (e.g., liability, confidentiality, location of the organization, hours of operation, etc.) are identified and overcome quickly.



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Build Understanding and Collaboration

These characteristics examine the extent to which staff and volunteers are **viewed as valued contributors** to the organization and **work together** as partners in a **team** effort to accomplish the work of the organization



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Build Understanding and Collaboration

Paid staff are **respected** and are **empowered** to fully participate in planning, decision-making and management related to volunteer involvement.



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Build Understanding and Collaboration

There is a **conscious, active** effort to **reduce** the **boundaries** and **increase** the **teamwork** between paid and volunteer staff



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Build Understanding and Collaboration

Success breeds success as **stories** of the **contributions** of volunteers—both historically and currently—**are shared** among both paid and volunteer staff



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Learn, Grow and Change

These characteristics examine the extent to which the organization is dynamically **examining** and **attempting to improve** its **operation**, including the continuous effort to broaden its volunteer base to include all segments of the community.



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Learn, Grow and Change

- There is an **openness** to the possibility of **change**, an **eagerness to improve** performance, and conscious, organized efforts to **learn** from and about volunteers' experiences in the organization.



- There is a **recognition** of the **value of involving**, as **volunteers**, people from all segments of the community, including those the organization seeks to serve

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Why do people volunteer?
Why do they stop volunteering?



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Two Main Reasons People Volunteer

They were asked



They want to do something good for others



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Barriers to Volunteering

- Time
- Need for flexibility, unable to commit
- Costs
- Location
- Lack of childcare
- Type of service (e.g., homeless, prisoner, etc.)

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Why Do People Stop Volunteering?

#1 Reason - They feel that their skills and time is not being utilized well



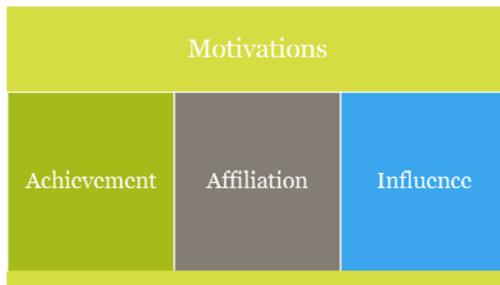
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Motivational Analysis



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McClelland's Theory of Social Motivators



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McClelland's Theory of Social Motivators

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.



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McClelland's Theory of Social Motivators

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.



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McClelland's Theory of Social Motivators

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, they like to give advice, verbally fluent, outspoken, confident, charismatic, and they create confidence in others



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Score Motivational Analysis

Use the Motivational Analysis Key to score your quiz



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McClelland's Theory of Social Motivators

How can you apply this information when working with volunteers?



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Break

- 5 Minute Break
Please return at 10:25 a.m.



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Planning Your Volunteer Program *Building a Solid Foundation*

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Objectives

- Write a purpose statement for your volunteer program
- Examine rationale for and challenges regarding managing a volunteer program
- Determine criteria for appropriate roles for volunteers
- Identify the basic tenants of risk management
- Identify resources needed to manage an effective volunteer program

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Elements of a Volunteer Program

Activity

- Put cards in order according to when the listed activity begins
- Be sure and tell the group if you believe the activity is on-going

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Benefits and Challenges

What are some challenges?

- For volunteers, what are the challenges to volunteering?
- For organizations, what are the challenges of volunteerism?

What are some benefits?

- Why involve volunteers? What are the advantages of working with volunteers that you would not get working with paid employees?
- If you had all the money your organization needed, for what reasons would you still engage volunteers?
- What would happen if volunteers were not involved in your organizations?

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Benefits and Challenges

For Volunteers

- **Cost:** money for travel food other associated expenses
- **Time:** having enough or managing schedule
- **Juggling commitments**
- Individual's **lack of confidence**

For Organizations

- Appropriate **resources, money and time**
- **Recruiting the right volunteers**
- **Matching volunteers** to appropriate roles
- Providing appropriate level of **support and supervision**

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Why Involve Volunteers

- Community outreach
- Community input
- Gain additional human resources
- Gain additional expertise
- Increase number of community advocates for agency and mission
- Gain access to contacts in the corporate and foundation sectors
- Act as a conduit to other groups
- Provide community monitoring
- Help meet and advance mission
- Help to maximize financial resources
- Demonstrate community support for program
- Assist in fund-raising
- Provide ability to react to short-term crises
- Allow agency flexibility to react quickly to changing community conditions
- Supplement staff resources and experiences

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MISSION, Vision, and Purpose

Mission

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.

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Mission, VISION, and Purpose

Vision

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.

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Mission, Vision, and PURPOSE

Purpose Statement

A statement that 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.

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Learning Activity

Activity

- Complete the Writing a Purpose Statement Worksheet individually.
- Connect with a partner
- Introduce yourself to your partner, but do not tell anything about your organization, including its name.
 - Trade purpose statement worksheets with your partner.
 - Read what your partner wrote.
 - In your own words tell your partner the types of things you think volunteers do (or could do) in this organization.
 - Discuss the clarity of the purpose statement and what makes it clear or unclear.

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Purpose Statement

How Might a Purpose Statement Be Used?

- **To engage/empower current volunteers** by helping to write the statement
- **Recruit** more of the right volunteers
- **Demonstrate value** of program to others in the organization and the community
- **Help volunteer manager prioritize and stay focused** on the most meaningful goals of the program
- **Use in outreach:** cover letters, recruitment, press releases, agency annual report
- **Create a poster** for your lobby
- Other

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Conducting a Needs Assessment

Why Conduct a Volunteer Needs Assessment?

- Helps identify where volunteers should be placed
- Helps identify where volunteers are no longer needed
- Helps identify ways volunteers can make staff more effective
- Creates staff buy in for volunteer programs

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Conducting a Needs Assessment

How can you gather the information you need? What are the pros and cons of each?

- Interviews with current staff, volunteers, clients
- Surveys to staff, volunteers, clients
- Focus groups
- Other

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Conducting a Needs Assessment

What types of questions could you ask?

- 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?
- Others

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Conducting a Needs Assessment

How can you use the information from a needs assessment?

- To identify unmet needs in the organization
- To design and recruit for volunteer positions to fill unmet needs
- To "decommission" volunteer positions
- To help identify a organizational baseline for which you can build your evaluation plan and assess progress

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Appropriate Volunteer Roles

Roles for Volunteers: **Acceptable** / **Questionable** / **Inappropriate**

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

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Volunteer Position Description

Activity

- Complete the Volunteer Position Description Worksheet for a new position that you would like to create.
- Switch worksheets with a partner and provide feedback.

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Introduction to Risk Management

What is Risk Management?

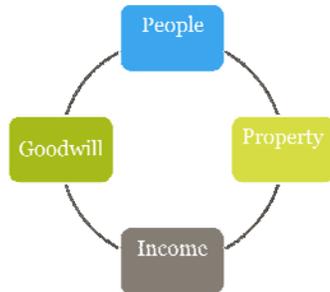
- The identification, assessment and prioritization of risk followed by an action to minimize, monitor or control the effects
- Utilizing pre-set plans or procedures to control situations that may be potentially harmful to your organization, program, volunteers or clients

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Three Things to Remember

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What's at Risk?



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What's at Risk?

Areas of potential risk:

- Volunteer liability (Volunteer Protection Act)
- Organization's liability due to volunteer actions
- Organization's liability to volunteers (e.g., unsafe working conditions or discriminatory practices)
- Organizations liability to persons served by volunteers

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Policies and Procedures

- Screening
 - including volunteer application, background checks, interview, reference checks
- Supervision
- Orientation
- Training
- Waiver forms
- Other

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Introduction to Risk Management

Principals of Risk Management

1. Identify

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Introduction to Risk Management

Principals of Risk Management

1. Identify

2. Evaluate

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Introduction to Risk Management

3. Control Risks

Create a plan for managing risks.

- ✓ Avoid the risk situation by not engaging in the activity.  Avoid the risk
- ✓ Eliminate the risk by modifying the activity.  Reduce the negative effect
- ✓ Minimize the risk by modifying the activity.  Accept some or all of the consequences
- ✓ Transfer financial liability through contract or insurance.  Transfer the risk

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Key Questions to Ask

- What do our volunteers do? (Or what new activities do we want them to do)
- What could go wrong?
- How probable is it that it will go wrong? 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?

Resources

- www.nonprofitriskmanagement.org
- State laws and statutes that apply

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Volunteer Program Resources

- What resources are needed to successfully manage your volunteer program?
- What items have a direct cost related to them, such as designing and printing a brochure?
- What are other resources that might have indirect costs?

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Identifying Resources

- **Direct Program Costs**
- **Other Resources**

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Identifying Resources

- How can you advocate within your organization to get the resources you need to be successful?
 - Create a volunteer advisory council chaired by a current board member.
 - Host a focus group of volunteers and staff and present report or recommendations to supervisor or board.
 - Prepare a quarterly report to the board on the value of the volunteer program.
 - Other.

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Break

- 5 Minute Break
Please return at 11:50 a.m.



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Recruiting and Placing Volunteers: *Matching Volunteer Skills with Service Needs*

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Objectives

- Importance of volunteer position descriptions
- Develop and implement a targeted recruitment strategy
- Craft a volunteer recruitment message and communications strategy
- Techniques for screening, interviewing and matching volunteers

Plus:

- Utilizing the Volunteer Network resources for effective recruitment

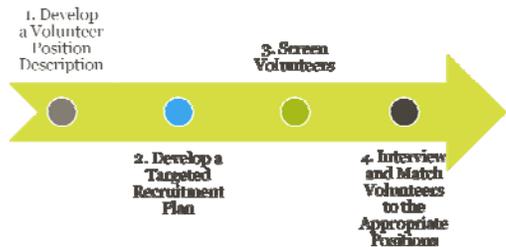
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What is Volunteer Recruitment

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

81

Steps to Recruiting and Placing Volunteers



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Step One

Develop a volunteer position description



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Foundation of Recruitment

The Position Description

- Identifies skills and attributes needed in the volunteer
- Helps to focus (i.e., target) recruitment efforts
- Attracts the right people for the position
- Sets expectations for the position

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Components of Volunteer Position

- Position Title
- Work Location
- Reports to
- Purpose of Position
- Responsibilities and Duties
- Qualifications
- Commitment Expected
- Training
- Benefits to Volunteer

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Step 2

Developing Your Targeted Recruitment Plan



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Recruitment

• Warm Body Recruitment

Sending a message about a volunteer opportunity to as broad an audience as possible (e.g., advertisements, PSA, brochures)

• Targeted Recruitment

Sending a message about a volunteer opportunity to an audience who has the specific time, skills and/or traits required for the position

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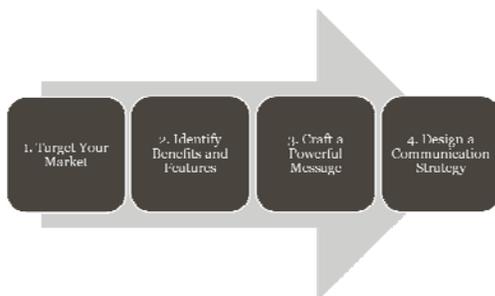
Purpose of Targeted Recruitment

“When you send a message to the community in general, you often wind up speaking to no one in particular.”
(Rick Lynch)



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Targeted Recruitment



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Ask The Following Questions

- Who is your target audience?
- What are important features of position?
- What would appeal to them about the position?
- What are some possible barriers?
- What additional things do we need to know about the audience?
- What strategies should you use to reach your audience?

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Step 1: Target Your Market

Activity

- List as many volunteer populations for which you might be targeting

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Targeted Populations

- Seniors
- Board of directors
- College students
- Children
- Youth
- Baby Boomers
- Persons with disabilities
- Faith-based groups
- Skills-based volunteers
- Corporate volunteers
- Disaster volunteers
- Self-directed volunteers
- Volunteer leaders
- Virtual volunteers
- Others

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	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, Voicemail, 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

Gregg Hamill - Mixing and Managing Four Generations of Employees. ©Copyright 2005 Fairleigh Dickinson University.

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Small Group Activity

- Using your position descriptions, fill out step one of the Recruitment Message Worksheet located in your handouts

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Step 2: Identify Benefits and Features

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

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

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Small Group Activity

- Using your position descriptions, fill out step two of the Recruitment Message Worksheet located in your handouts

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Step 3: Craft a Powerful Message

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

Example: Senior Swim Club Driver

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Small Group Activity

- Using your position descriptions, fill out step three of the Recruitment Message Worksheet located in your handouts

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Step 4: Design a Communications Strategy

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

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Marketing Your Message

- Distribute brochures or posters
- Make public service announcements on television, radio, or newspaper
- Advertise! Advertise! Advertise!
- Speak to community groups (e.g., faith-based, neighborhood groups, community forums)
- Post to online venues (e.g., Websites, Twitter, YouTube, Facebook, blogs, etc.)
- Word of mouth - "The personal ask"
- Talk to current volunteers, staff, and board members
- Set up a booth at a local events (e.g., farmers markets, festivals, etc.)

• Refer to handouts for more ideas

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Online Recruiting Resources

www.bloomington.in.gov/volunteer

www.1-800-volunteer.org

www.craigslist.org

www.facebook.com

www.handsonnetwork.org

Blogs







• www.serve.gov

• www.youtube.com

• www.volunteermatch.org

• www.idealists.org

• Widgets



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Small Group Activity

- Return to the Recruitment Message Worksheet located in your handouts and complete Step 4 – Design a Communication Strategy

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Step 3

Screen volunteers



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Screening

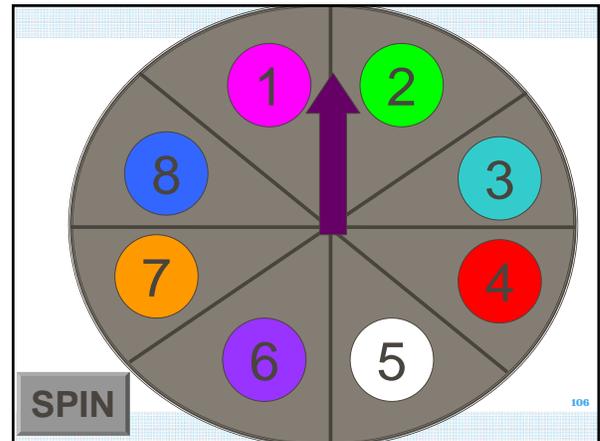
- Ensures applicant meets the minimum requirements of position
 - Previous education and/or experience in similar roles
- Ensures the volunteer understands expectations
- Essential risk assessment process
- Starts with position description and continues throughout life of volunteer service

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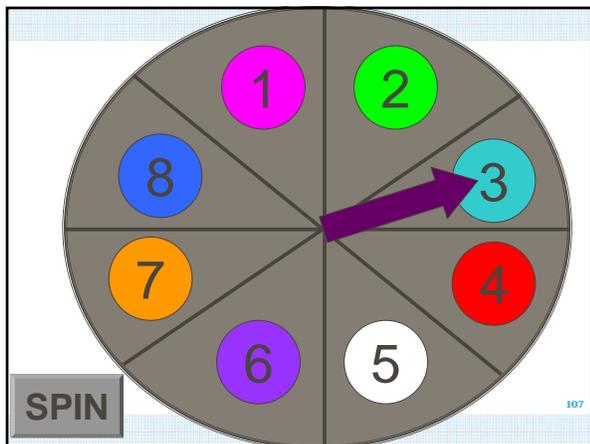
Wheel of Fortune

Guess that Screening Technique

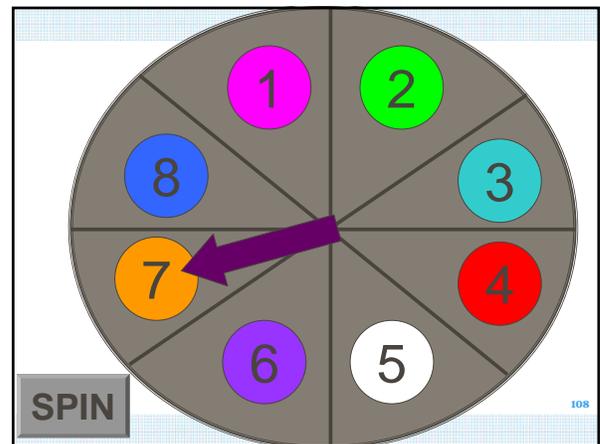
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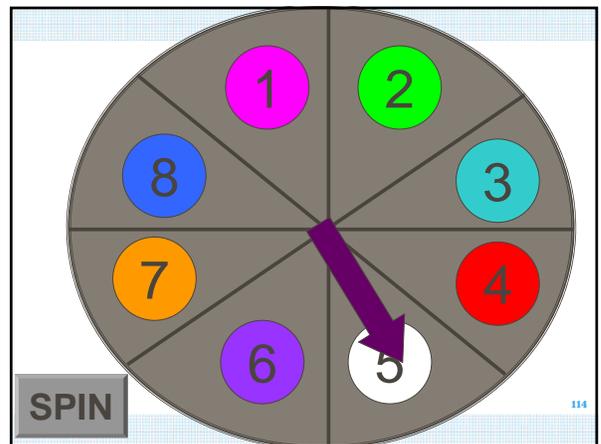
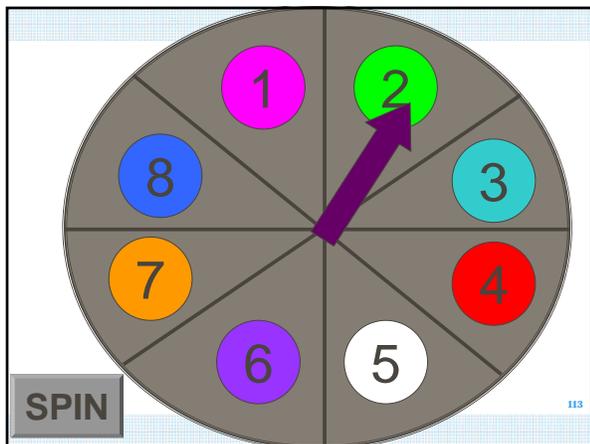
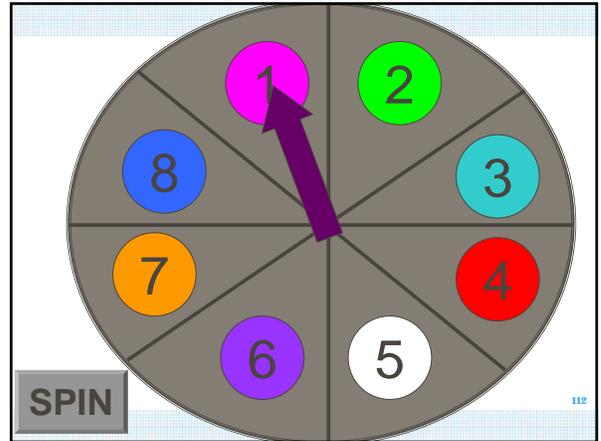
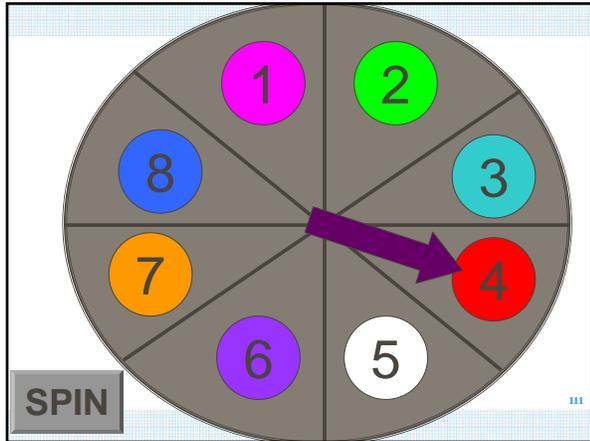
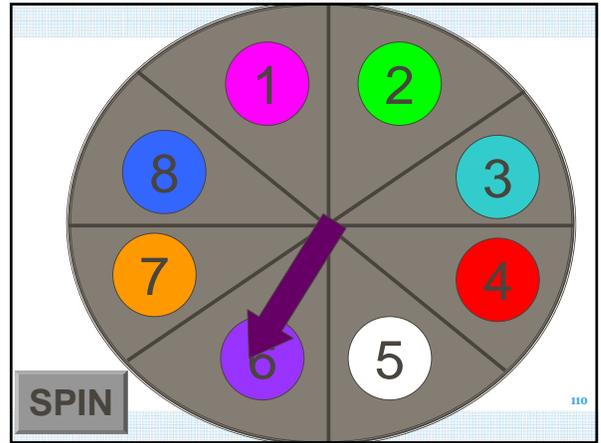
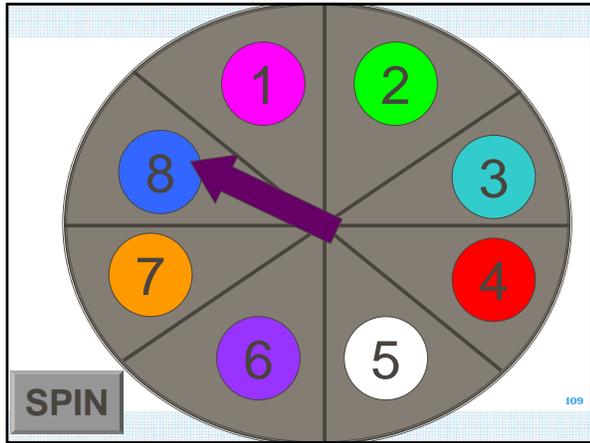
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Question

- What are some factors that determine the intensity of your screening?
 - Amount of time volunteer is unsupervised
 - Access to vulnerable populations
 - Requirement to handle funds
 - Requirement to operate a vehicle
 - Level of physical risk to the volunteer
 - Other

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Step 4

Interview and match volunteers to the appropriate positions



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Small Group Activity

- The Many Reasons Why We Interview Volunteers
- The “Who” and the “What”
- The “What Not to Do”
- Interviewing Role Play

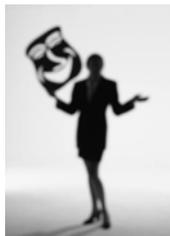
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What Not to Do

- Age
- Birthplace
- Height and Weight
- Marital Status
- National Origin
- Religious Affiliation
- Race
- Sexual Orientation
- Anything not directly related to the volunteer position

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Interviewing Role Play



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Modifying the Position Description

- Once you have a good sense of the potential volunteer, sometimes it makes sense to modify the position description to create a better fit between the volunteer and the position

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Lunch Break

- Please return at 1:40 p.m.



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