

## The Essentials of Volunteer Management Part II

Today's Trainers:  
Bet Savich, 349-3472 or savichb@bloomington.in.gov  
Lucy Schaich, 349-3433 or schaichl@bloomington.in.gov



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### Objectives

- Articulate the importance of orienting and training volunteers to perform service effectively and enjoyably
- Describe the steps in planning volunteer orientation and training
- Assess volunteer training needs
- Develop effective volunteer training strategies

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### Orienting and Training Volunteers: *goal - to achieve excellence*

#### Orientation

- Provides volunteers with information about the organization, the volunteer program and how volunteers fit into the mission of the organization

#### Training

- Provides volunteers with specific knowledge, skills and attitudes they will need to effectively perform specific roles/duties

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### Orientation

*"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"*

McCurley & Lynch, *Volunteer Management*, 2006

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### Questions:

- What are the consequences of NOT orienting and/or effectively training volunteers?
- What are the benefits of effectively orienting and training volunteers?

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### Training in Your Organization

- How is training handled in your organization (for volunteers and staff)?
- Who conducts training?

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## Role of the Volunteer Manager

- Ensure volunteers receive adequate orientation and training across the organization
- Train staff on orientation and training design and delivery

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## What Makes Volunteer Training Unique?

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## Orientation

*“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”*

McCurley & Lynch, *Volunteer Management*, 2006

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## Orientation

**Cause:** Why should I be volunteering here?

**System:** How will I be volunteering here?

**Social:** Where do I fit in?

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## Organization #1:

- The Cause / Issue / Problem / Asset (p. 3)

## Organization #2:

- The System (p. 4)

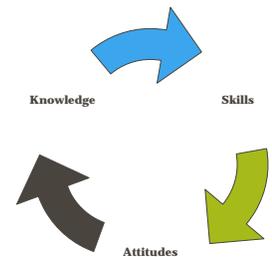
## Organization #3:

- The Social Orientation (p. 5)

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## Training

The process of providing volunteers with the ability to perform specific types of work



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### Step 1: Identify Training Needs

- **Increase Knowledge** – Increase the amount of information your volunteer has
- **Increase Skills** – Increase your volunteer's ability to perform tasks
- **Change Attitudes** – Change the way your volunteer feels about an issue

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### Four Steps in Training Volunteers

#### Step 1: Identify Training Needs

Step 2: Design Training

Step 3: Deliver Training

Step 4: Assess and Refine Training

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### Step 1: Identify Training Needs

#### Activity

- Review the sample position description on p. 6
- With your partner, determine what knowledge, skills, and attitudes the volunteer who fills this position will need
- Complete the bottom portion of worksheet

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### Four Steps in Training Volunteers

Step 1: Identify Training Needs

Step 2: Design Training

Step 3: Deliver Training

Step 4: Assess and Refine Training

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### Step 2: Design the Training

Tell me, and I will forget;  
Show me, and I may  
remember;  
Involve me, and I will  
understand.

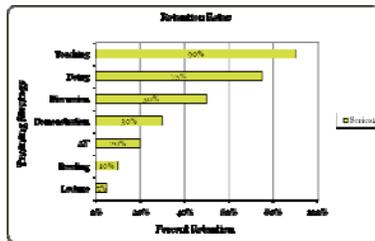


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### Effective training must:

- 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



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## Step 2: Design the Training

- Form small groups
- Identify a volunteer position for which the team will design a training. (p. 9)
- 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 (p. 10). What the form calls the objective is a particular knowledge, skill or attitude.
- Comments? Questions?
- Please stay in your group.

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## Four Steps in Training Volunteers

**Step 1:** Identify Training Needs

**Step 2:** Design Training

**Step 3:** Deliver Training

**Step 4:** Assess and Refine Training

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## Step 3: 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

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## Four Steps in Training Volunteers

**Step 1:** Identify Training Needs

**Step 2:** Design Training

**Step 3:** Deliver Training

**Step 4:** Assess and Refine Training

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## Brainstorm

What are ways to evaluate the effectiveness of volunteer training?

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## Four Levels of Evaluation Training

- **Reaction** – a measure of satisfaction. Answers questions such as: Were participants pleased? What do they plan to do with what they learned?
- **Learning** – a measure of learning. Answers questions such as: What skills, knowledge, or attitudes have changed? By how much?
- **Behavior** – a measure of behavior change. Answers questions such as: Did participants change their behavior based on what was learned in the program?
- **Results** – A measure of results. Answers questions such as: Did the change in behavior positively affect the organization.

(Kirkpatrick)

## Break

- 5 Minute Break  
Please return at 2:45 p.m.



Image: Salvatore Vuorio / FreeDigitalPhotos.net

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Be the Change.

## Supervising Volunteers: *Maximizing the Volunteer Experience*



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## Consequences of Poor Supervision



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## Objectives

- Increase knowledge of the steps for supervising volunteers
- Increase ability to design and use strategies for volunteer supervision
- Develop next steps to improving volunteer supervision

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## Steps in Supervising Volunteers

- **Step 1:** Define and Communicate Clear Expectations
- **Step 2:** Guide and Support Volunteers
- **Step 3:** Ensure that Volunteers Feel Rewarded and Recognized



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## Step 1

- Define and Communicate Clear Expectations



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## Step 2

- Guide and support your volunteers



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## Group Exercise

- Put yourself in a volunteer's shoes
- You have volunteered at an organization once before, watched a five-minute orientation video, then worked for a few hours preparing a bulk mailing
- You are now being asked to take on a different project and are about to be given instructions
- Out of the four options presented, which set would you most like to receive before beginning this volunteering session?



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## Step 2

- Guide and support your volunteers



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## Dimensions of Diversity

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

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## 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

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## 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)

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## Scenarios

- Focus on the supervision scenario assigned to your group.
- If reasonable, think about in terms of your own organization
- How would you handle this situation?

\*\*\* You don't need to agree with each other!

\*\*\* If you finish, read the other scenarios

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## McClelland's Theory of Social Motivators



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## Social Motivators

- David McClelland discovered that people are motivated by a mix of:
  - Achievement
  - Affiliation
  - Influence
- Motivations often change as we get older.
  - Someone new to the area may be motivated by a need for affiliation

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## Step 3

- Ensure that Volunteers Feel Rewarded and Recognized



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### Dealing With Difficult Volunteers

- Sometimes volunteers behave inappropriately
- Although confronting volunteers can be difficult, it is necessary
- For the good of your program, problems must be addressed

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### Dealing with Difficult Volunteers

- Every agency should have a written Code of Conduct
  - Include a list of behaviors that will not be tolerated and the resulting disciplinary process(es)
  - This information should be reviewed during orientations



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### Wrap Up and Next Steps

- Write down one to three additional steps for improving supervision, and then share these with you neighbor

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### Break

- 5 Minute Break  
Please return at 4:05 p.m.



Image: Salvatore Vuono / FreeDigitalPhotos.net

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### **Evaluation** *Improving Results Through Data and Feedback*

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## Objectives

- Outline the basic steps to build a foundation for evaluating
- Identify the steps to designing and implementing an evaluation
- Note important factors to consider when reporting evaluation results
- Identify different evaluation methods (see resource materials)

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## Evaluation Provides

- Adequate data upon which to make **critical decisions** about the program
- The opportunity to **continuously improve** services to community as well as the volunteer experience
- Data for the organization to better **communicate its story**

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## Why Evaluation Is Important



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## Definition

Volunteer program evaluation is the ongoing process of collecting and analyzing data to provide the organization with adequate knowledge on which to base programmatic and organizational decisions.

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## Conduct a Stress Ball Evaluation

- In groups of three to five people, discuss and complete columns one and two of handout.
- Your list does not need to be exhaustive.
- Squeeze each stress ball and complete columns three and four. If you prefer, you can be an observer and not squeeze.
- Keep notes on process, decisions made, and challenges encountered.



Activity used with permission. Source: Preskill & Russ-Eft, 2005

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## You Are Not Alone



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## Five Steps to Building a Foundation



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## Develop an Evaluation Team

- Volunteers
- Paid staff
- Person managing volunteer efforts
- Outside evaluation experts
- Organizational decision makers
- Community members
- Board members
- Clients or those served by your organization
- Students and interns

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## Other Ways to Build Organizational Capacity for Evaluation

- Partner with your local college or university
- Recruit skills-based volunteers
- Network with other nonprofits
- Continue to learn (read, research, take additional training, etc.)
- Other

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## Define Your Purpose

- Why are you conducting an evaluation?
- What decisions do you want or need to make upon completion of the evaluation?
- The purpose determines
  - Audience
  - Methods
  - Data to be collected

Note: This is the most important part of the process!

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## Align with Organizational Plan and Allocate Resources

- Connect evaluation efforts with organizational planning.
- Always put evaluation efforts in context.
  - The level of evaluation and the resources allocated to the project.
- Get creative!

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## Identify Stakeholders Activity

### Stakeholder Needs

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

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## Audience

Who do you need information from?  
Who will you be giving information to?

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## Five Steps to Designing and Implementing Evaluation



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## Wrap Up and Next Steps

- Write down two things you learned today and ways you will apply them when you get back to your organization

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## Thank You for Participating!

### Trainers:

Lucy Schaich, 349-3433; [schaichl@bloomington.in.gov](mailto:schaichl@bloomington.in.gov)  
Bet Savich, 349-3472; [savichb@bloomington.in.gov](mailto:savichb@bloomington.in.gov) or  
[volunteer@bloomington.in.gov](mailto:volunteer@bloomington.in.gov)



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