

## **Volunteer Program Strategic Planning Best Practices**

Each section highlights an essential element of a successful volunteer program.

**Section 1:** Planning and Organization and

**Section 2:** Policies and Procedures cover what needs to be done before a volunteer sets foot in your agency. Clarifying the need for volunteers, developing goals and objectives, and writing position/task descriptions are some of the preliminary tasks.

**Section 3:** Volunteer Recruitment and

**Section 4:** Screening, Interviewing and Placement help you locate volunteers and judge whether they are a good fit with your agency.

### **When you have volunteers on board**

**Section 5:** Orientation and Training stresses the importance of introducing the volunteer to your agency and emphasizing the expectations you and the volunteer have of each other in order to develop a successful partnership.

**Section 6:** Supervision. Supervising volunteers well will ensure the success of your program.

**Section 7:** Volunteer Performance Evaluation outlines the steps for developing an evaluation system to determine whether the complement of volunteers continues to be suited to the agency.

**Section 8:** Retention and Recognition suggests ways to recognize the contributions volunteers make to your organization. Recognizing volunteers develops a bond with the organization and continues to contribute to your program.

**Section 9:** Measuring Volunteer Program Effectiveness features insights into assessing how well your volunteer program works. Often crucial for potential funders, this section will help you determine whether you are meeting your goals and objectives. The final section,

### **Section 1: Planning and Organization**

Planning for your volunteer program gives you the opportunity to work out the purpose of the program, the role of volunteers in the organization, the program's contribution to the organization's mission, and how the volunteer program fits into the structure of the organization. Planning is best done with input from those who will be affected by the volunteer

program, particularly the leaders, the paid staff, and the clients of the organization. A thorough planning process will include the following elements:

**Mission Statement:** Why does the volunteer program exist?

A mission statement is a sentence or short paragraph that states the purpose of the volunteer program and the needs the program addresses. A volunteer program's mission statement should impart a sense of purpose among paid and volunteer staff, helping each to understand the importance of the work they do, and how each complements the other.

**Vision Statement:** What will the future be like because of the volunteer program?

A vision statement provides a description of what the world will look like when the mission is accomplished. It should address everything the program strives to change, for example, the larger community, the environment of the organization, and the well-being of the clients.

**Needs Assessment:** What needs will the volunteer program address?

Formal and informal input from community members, paid staff, and clients will help focus the talents of volunteers where they can be of most assistance. Input from paid staff will also help allay any concerns they may have about effectively working with the volunteer program to meet unmet needs. Obtaining input from the people being served at this initial stage helps to build investment and support for your volunteer program.

**Goals and Objectives:** What will be the impact of the volunteer program?

Defining measurable goals and objectives gives your volunteers a clear picture of what needs to be accomplished and provides the agency with a way to evaluate the program. Measurable goals incorporate what will be accomplished, by whom, how often, and to what extent.

**Budget:** What is the budget for the volunteer program?

"Volunteer" does not mean "free." Be sure to determine the financial, in-kind, and human resource support necessary to develop and sustain the volunteer program. A good starting point for a volunteer program budget would be a line item for each of the sections of this publication. For example, include in the budget expenses for developing policies and procedures, producing and disseminating recruitment materials, conducting background checks, obtaining training supplies, and hosting recognition events.

**Building Investment Among Staff:** How will you prepare paid staff to work with and manage volunteers?

After obtaining input from paid staff on the design of the volunteer program, keep them

informed as the program develops. Report successes. Ask for help in resolving problems. Provide training for staff on the workings of the volunteer program. If they buy in to the volunteer program, paid staff will create a welcoming environment for volunteers. If not, they may give volunteers the impression that they aren't valued. Make clear to paid staff that volunteers are brought in to support and enhance their work, not to replace them.

Position Descriptions: What will volunteers do?

Position descriptions are critical to the success of your volunteer program. Your agency is most likely to be able to recruit and retain volunteers if you offer clearly defined positions that take into account a volunteer's needs as well as yours. Every volunteer should receive a written position description that includes: his/her title, the purpose of the assignment, the results to be achieved, suggested activities, evaluation criteria, qualifications, time frame, the site where the volunteer will work, supervision, and benefits.

## **Section 2: Policies and Procedures**

Policies and procedures are the nuts and bolts of the volunteer program. A policy is a principle, plan, or course of action. Policies tell people what to do. A procedure is a series of steps that direct people how to do what they must do.

Reasons to define policies

- Connects the volunteer program to the larger organization and its mission.
- Provides structure for sound management.
- Formalizes decisions that have already been made.
- Ensures continuity over time and promotes equity and standardization.
- Articulates the importance of volunteers and provides an ongoing element of volunteer recognition.
- Contributes to increased volunteer satisfaction, productiveness, and retention.

Types of written policies that should be developed

- Statements of belief/position/value of organization.
- Mechanisms for managing risk (e.g., insurance coverage, background checks).
- Rules to specify expectations, regulations, and guides to action (e.g., confidentiality, time and training commitments, customer service).
- Aids to program effectiveness (e.g., personnel policies) modified for the volunteer program.

Specific levels of policies

- Organizational - broad, general statements (e.g., beliefs, values, mission of organization as a whole).

- General - policies about the volunteer program (e.g., why it exists, what constitutes a volunteer, etc.).
- Specific - policies within the volunteer program (e.g., specify what to do).

Seven steps in policy development for volunteer programs

1. Recognize that volunteer involvement already exists within the organization.
2. Acknowledge that volunteers are important within the organization.
3. Acknowledge that volunteer involvement warrants the attention of senior management.
4. Begin to give consideration to the volunteer program — develop a philosophy of why volunteers should be involved in programs and services the agency provides.
5. Develop policies about volunteer involvement.
6. Develop operational guidelines, standards, and procedures for volunteer involvement.
7. Ensure volunteer program evaluation, compliance with established policies and standards, and regular policy review.

### **Section 3: Volunteer Recruitment**

Volunteer recruitment means attracting and inviting people to consider involvement with your organization. Many new volunteer administrators make the mistake of beginning their recruiting before they have an idea of why they are recruiting and for what positions. The most important step for recruitment is planning and design. In order to do this, you must spend time learning about your organization from the inside as well as how your organization is perceived by the community and public at large.

#### Recruitment Message

The recruitment message should be inviting and encourage people to become involved with your organization. An organization may have multiple recruitment messages tailored to the volunteers being sought, such as students, professionals, neighborhood residents, or client family members. Each message should identify:

- The specific need (of the clients and/or the organization);
- How the volunteer can alleviate the need; and
- The benefits to the volunteer.

In evaluating your recruitment message, ask yourself the following questions:

- Does the message honor the volunteer?
- Do I know why some people might not say yes?
- Is the message tailored to a target audience?
- Does my invitation include the needs of our clients?

- Who in the organization can best deliver this message?

### Recruitment Strategies

The two most common strategies used to recruit volunteers for defined positions are non-targeted recruitment and targeted recruitment. Non-targeted recruitment means looking for people with general skills, such as volunteers to participate in community clean-up projects or stock shelves at a food pantry. Targeted recruitment involves looking for people with specific skills, such as lawyers, public relations experts, or graphic artists. Both strategies must use the recruitment messages as described above.

### Recruitment Process

People most often volunteer when they feel they are being asked to get involved personally. Don't assume a general advertisement in a newspaper will attract all or most of the volunteers you need. People need to be asked again and again! Recruit for specific projects and programs throughout the year rather than during a once-a-year campaign. When recruiting volunteers, involve the entire organization, from the CEO to the board of directors to the clients to current active volunteers. Sometimes the volunteer administrator is not the most effective recruiter. In membership groups such as the Kiwanis or Rotary, for example, an active member of the group is the better choice to deliver the message. In addition, peers may be especially good at recruiting students and professionals.

### Recruiting for Diversity

Diversity should be an essential element in your recruitment plan. In addition to race and ethnicity, consider other components of diversity, such as age, gender, education, income levels, religious beliefs, physical abilities, and skills. Know the demographics of the community your organization serves. The organization will be more effective if both your paid staff and your volunteer staff reflect the community. Also, consider recruiting volunteers from the population your organization exists to serve. This demonstrates to the community that people are assets, and it tells your consumers that you value them as partners, not just as clients.

Finally, consider deliberate and strategic outreach to youth, seniors, and people with disabilities. These groups have traditionally been viewed as targets of volunteer efforts, not as potential volunteers. Everyone has something to offer, and youth organization may be in an ideal position to bring out the best in those who are rarely asked to volunteer.

### Recruiting Techniques

There are many techniques available for recruiting volunteers. You must decide which is best

for disseminating the recruitment message for your organization and for your specific volunteer positions. Some recruitment techniques to try are:

- Mass media — print and broadcast
- Public speaking
- Outreach to membership or professional organizations
- Slide shows
- Videotapes
- Direct mail
- Articles in local newspapers and newsletters of other organizations
- Referrals from individuals associated with your organization
- Volunteer fairs
- Internet web-sites
- Volunteer Center referrals

#### **Section 4: Screening, Interviewing and Placement**

Matching potential volunteers to volunteer positions will be an important part of your program's success. Making the match involves using a series of screening techniques that allow the organization and the volunteer to get to know each other and decide whether and how to best work together. Volunteer program administrators may use the screening tools human resources officers use: applications, reference checks, interviews, background checks, training, and observation. Screening potential volunteers should be as sophisticated as necessary for the type of volunteer task under consideration. Volunteers for a community clean-up and volunteers for a one-to-one mentoring program, for example, would go through very different screening processes. The goal of screening is to get the right volunteer into the right position.

##### **Initial Contact**

The initial contact is the first step in the process of determining the fit between a potential volunteer and your program. Whether that contact is by telephone, in person, or on-line, be prepared to provide some basic information about your agency and the volunteer opportunities available. Also, get a general idea of what the volunteer is interested in doing and why he wishes to serve your organization. If it appears there may be a fit, gather relevant contact information, including:

- Method of contact
- Name
- Address, including zip code

- Telephone numbers (with area code)
- Fax number and e-mail address
- Referral source (how the potential volunteer heard about the program)
- Specific activities the potential volunteer may be interested in doing as a volunteer

#### Applications

After the initial contact, you will want to either schedule an interview or have the prospective volunteer complete an application for the position for which the person is applying and decide after reviewing it whether to invite the person in for an interview. Volunteer applications may be very simple or extremely detailed, again, depending on the volunteer position involved. The application and the interview should elicit enough information to determine whether the prospective volunteer is appropriate for your organization and, if so, how he or she may best serve the organization.

#### Background Checks

Depending on the nature of your agency, the clients you serve, and the work to be done by volunteers, you might require additional screening before placing a volunteer. Be sure to check industry requirements and legal requirements. Screening tools may include:

- Personal and/or employment references
- Criminal background checks
- Fingerprinting
- Driving records checks
- Substance abuse tests
- Physical examinations

Volunteer programs induct volunteers differently according to what procedures best suit the program. Some will conduct a background check and then proceed to the interview, while others believe it is more efficient to meet the applicant before conducting a time-consuming and sometimes costly background check.

#### Interviews

A face-to-face interview provides an opportunity for a more detailed discussion of your agency's mission, vision, and goals, as well as the volunteer's interests, motivations, and needs. It may be appropriate for the volunteer to be interviewed by more than one person on staff or by volunteers. Whether you use a scripted list of questions based, in part, on information provided on the application, or you simply work from the application itself, the interview is your opportunity to learn about the potential volunteer's:

- Knowledge, skills, and experience pertinent to requirements of the volunteer position;

- Preferences or aversions to specific tasks or types of assignments;
- Schedule and availability;
- Willingness/ability to make the necessary time commitment; and
- Willingness/ability to meet other agency expectations.

#### Placement

You should make every effort to place the volunteer in a position that provides a good match between the skills and interests identified during the screening process and the duties you need performed. This effort will pay off in the quality of tasks performed and the volunteer's level of satisfaction.

Sometimes, even with appropriate support and training, the first placement may not be the best match. Be flexible enough to try other positions that might provide a better fit.

Finally, not every potential volunteer may be suited for your program—in any capacity. No matter how short-handed your agency might be, it is better to be short-handed a bit longer than to invest time and energy in a volunteer who isn't a good fit for your program.

### **Section 5: Orientation and Training**

Initial orientation and training prepares volunteers to perform their duties efficiently and effectively. The policies and procedures developed earlier form the basis for the orientation; the position description forms the basis for the training. Volunteers who understand what is expected of them do a better job and feel satisfied by performing their duties and serving your organization.

#### Orientation

Orientation to your agency helps volunteers see their service within the context of the organization. Even the most menial tasks can become meaningful if presented in such a way that the volunteer understands how the task fits. Orientation is typically provided by the professional volunteer manager and includes the following topics:

- Agency Overview
  - o Description and history of the agency
  - o Mission, goals, and objectives
  - o Organization, structure, and introduction of key staff
  - o Description of programs and clients served
  - o Time lines and descriptions of major organizational events and activities
  - o Explanation of who's who and who does what

- o Location of restrooms, supplies, and equipment
- o Arrangements for breaks, meals, and refreshments
- o Parking
- Culture and Language of the Organization
- o Handbook of policies and procedures
- o Glossary of terms
- o Index to codes and abbreviations
- Facilities and Staff
- o Tour of the facility
- o Where to store personal belongings
- Volunteer Program Policies and Procedures
- o Types of tasks or other ways in which volunteers contribute
- o Service requirements
- o Check-in procedures
- o Recordkeeping
- o Training opportunities
- o Continuation/termination policies
- o Evaluation procedures

To ensure understanding of and compliance with program policies and procedures, provide each volunteer with a written resource in the form of a volunteer handbook, orientation packet, or other reference guides. This written resource may be provided during the volunteer's orientation or during their induction into your program. The resource reinforces the information presented in training, helps to address questions that arise during service, and can prove useful as a supervisory tool in dealing with performance issues.

Treating volunteers as part of your organization's staff helps them feel they are part of a team and fosters commitment and retention. Volunteers, as staff members, help represent your agency to the public. The more they know and understand about the nature of your operations and your cause, the more they can contribute to public relations, marketing, and advocacy.

### Training

Training gives volunteers the direction and skills necessary to carry out assigned tasks.

Training is typically provided by the staff in the area of the organization where the volunteer is assigned. In general, training should be:

- Specific to the requirements of the volunteer position
- Geared to the skill level of the volunteer

- On-going and address needs identified by both volunteer and supervisor
- Periodically evaluated to determine if it is on track

Training is also a form of recognition and serves to keep a volunteer motivated, committed, and performing the quality of service you expect. Sending a volunteer to a special class or conference can be a reward for service, even if the class is not directly related to the volunteer's assignment but is of broad interest to your organization, such as CPR training, public speaking, conflict resolution, or team building.

### **Section 6: Supervision**

Volunteers need support to perform their duties. They should have a designated supervisor to whom they can turn for advice, guidance, encouragement, and feedback. The supervisor also needs to provide the materials, training, and direction to enable the volunteer to perform assigned tasks.

A supervisor is responsible for getting the job done by enabling others to do the work. The most important responsibility of a supervisor of volunteers is creating an environment that empowers the volunteers to perform their duties. Empowered volunteers are willing to take responsibility for what they are doing, contribute more than expected, and perceive themselves to be important members of the organization's staff. Empower volunteers by providing:

- Sufficient orientation to the organization,
- Clear and appropriate expectations,
- Proper training and equipment,
- Evaluation of performance, and
- Regular reinforcement and recognition.

Volunteers want and need to be held accountable for their performance by their supervisors. An effective supervisor should be concerned that volunteers have confidence in themselves, are satisfied with their level of contribution, and have the opportunity to grow personally and professionally through their service.

The supervisor should be both willing and able to manage your volunteers. Not everyone knows how to work with and motivate volunteers. While many of the principles of supervision are the same for paid or unpaid staff, managing volunteers effectively takes special effort to see that volunteers' need for satisfaction with their assigned duties is met. A professional volunteer manager can support the supervisors of volunteers by eliciting feedback from the

supervisors and using it to evaluate the volunteer program periodically, by facilitating the sharing of experiences among the supervisors, and by showcasing good volunteer supervision.

### **Section 7: Volunteer Performance Evaluation**

Volunteers add value to an organization; evaluating their performance is one way to quantify their contributions toward achieving the mission of the organization. The volunteer program administrator and the volunteer's supervisor conduct periodic evaluations to give volunteers feedback on how they are performing assigned duties and tasks and meeting current objectives. These evaluations also give the administrator and the supervisor opportunities to set new goals for the volunteer, identify additional training needs the volunteer may have, and determine the effectiveness of the volunteer program procedures.

#### Performance Criteria

When you evaluate your volunteer staff, use the same criteria that you use to evaluate the performance of your paid staff. Clearly defined position descriptions are the basis for fair and equitable performance evaluations. Performance criteria should address both skills and accomplishments. Criteria used may include:

- Skills
  - o Dependability
  - o Cooperation
  - o Effective communication
  - o Problem solving
- Accomplishments
  - o Supports organizational vision and mission
  - o Meets goals and objectives of position
  - o Completes assigned tasks

#### Tips for Effective Evaluation

Effective evaluation is conducted at regular intervals and draws information from a variety of sources:

- Staff feedback
- Self-evaluations
- Program records

This information presents a picture of the volunteer's effectiveness. The information should be shared with the volunteer in such a way that it:

- Reinforces the volunteer's contributions
- Emphasizes the volunteer's impact on the organization

- Focuses on the volunteer's skills and accomplishments

#### Options When Volunteer Performance Is Substandard

When volunteers are performing below expectations or their service is no longer in the best interest of your organization, it may become necessary to take corrective action. You may consider:

- Re-training
- Transferring the volunteer to a new assignment
- Disciplinary action
- Retirement

There are circumstances, difficult and often uncomfortable for both parties, when the dismissal of a volunteer is necessary to maintain the credibility and integrity of your volunteer program. Volunteers should understand from their initial induction into your program that they may be terminated with or without cause. Spell out in advance that infractions and regulations, violations of the law, and other unsafe or inappropriate conduct are all grounds for termination.

### **Section 8: Retention and Recognition**

Understanding volunteers' motivations and remaining sensitive to their needs are essential to retaining volunteers. People's reasons for volunteering can differ dramatically. Regular and open communication will help determine the motivating element specific to each volunteer. Remember, also, that personal motivations can change over time.

#### Basic Motivation Factors

We have found three primary reasons why people choose to volunteer:

- Power: a volunteer motivated by power may need to be independent or to have control over a project.
- Achievement: a person motivated by achievement may seek to learn new skills through participation in a project.
- Affiliation: In large part, these people volunteer because they enjoy the social aspects of the work.

#### Assessing Motivation

The better you get to know a volunteer, the better you'll be able to identify that volunteer's motivation. Two-way communication is the key to success. Some strategies for keeping abreast of a volunteer's satisfaction include:

- Regularly sharing new developments in the program, the organization, and the field.
- Periodically soliciting the volunteer's suggestions about the program.

- Finding out what the volunteer likes most about her/his volunteer assignment and, if necessary, moving her/him to a position that includes more of what they enjoy.

Another strategy for retaining volunteers is promoting exceptional volunteers to more responsible positions. Think of a volunteer “career path” at your organization. A volunteer for an event, for example, might be recruited to become a volunteer for a sustained position and eventually be placed on the board of directors. Again, ongoing and open communication will be key to keeping volunteers engaged with your organization. For example, a newsletter to event volunteers will keep them informed of additional volunteer opportunities.

### Recognition

Recognition is how an organization tells volunteers that their efforts are important. Expressing thanks for donated time, energy, and expertise makes volunteers feel valued and appreciated. Praising individual volunteers, as well as the group, is a key volunteer retention strategy.

Recognition should be frequent and personal. Being sensitive to what volunteers expect helps the program administrator to design appropriate recognition activities. For example, volunteers seeking power may enjoy being thanked by the executive director and board of directors. A simple thank you from the paid staff may be appropriate for volunteers motivated by achievement. A party is right for the folks who volunteer to socialize. Section 10 contains resources you can use to plan effective recognition.

Finally, even when a volunteer is satisfied with his or her position in your organization and is properly recognized, life events, such as family re-location, may require the volunteer to move on. Use the volunteer program continuation/termination policies to help plan for turnover among your volunteers.

### Awards For Volunteer Service

Each year many local, state, and national organizations present awards to individuals and groups for their outstanding volunteer service. The awards programs typically require that a written nomination be submitted by the agency where the person volunteers. Using pre-determined criteria, the award program selects volunteers to receive special recognition. The award recipient may attend a ceremony, receive a written commendation, or have a donation made in his or her name to the organization that nominated him or her. Many organizations hold events to recognize volunteers in April during National Volunteer Week, although time lines vary.

The Governor's Office on Service and Volunteerism has a list of volunteer award programs. You may discover additional volunteer award programs sponsored by local government or civic groups. Some businesses sponsor volunteer recognition programs, such as the J.C. Penny Volunteer Awards. The Governor's Office on Service and Volunteerism sponsors the Governor's Volunteer and Service Awards each year. Other organizations sponsor award programs to recognize specific categories of volunteers, such as youth or seniors.

### **Section 9: Measuring Volunteer Program Effectiveness**

Agency and program leaders must make critical decisions regarding the distribution, use, and management of available resources. To help make these decisions, volunteer program managers need to document: (1) how financial, material, equipment, in-kind, and human resources have been, are being, and will be used by the agency to support agency efforts; and (2) what benefits these resources have brought to the clients and programs.

Evaluation should be tailored to your organization's capacity to evaluate. There are two basic types of evaluation. Formative program evaluation is used to monitor ongoing program effectiveness and to manage activity. It guides mid-year (or mid-project) adjustments and provides mid-year data for a year-end report. Summative program evaluation is a year-end (or project-end) report that includes results, strengths, weaknesses, recommendations, and future plans.

#### **Data Collection**

To measure program outcomes or attainment of program objectives, it is necessary to systematically collect and record baseline data in the early stages of planning. This data reveals how things were before the volunteer program went into effect. Once you have established the baseline, collect data that will show changes in behaviors, skills, or attitudes of the people affected by the volunteer program and the added value the program brings.

The manager may collect quantitative and qualitative data, such as the number of volunteers, the total time that volunteers commit to your organization, what duties volunteers perform, achievements of the volunteers, and the effectiveness of volunteers and paid staff working together. Data collection should draw on information already collected, and additional collection instruments should be developed based on the:

- Program goals and objectives
- Group targeted for evaluation
- Activities to be evaluated

- Resources available for implementing the evaluation

#### Evaluation Report

This data should be used to analyze how well the plan was implemented. The data collection method, or evaluation, should gather the best data the budget will allow and provide adequate time for gathering and analyzing the data. The evaluation report should be a succinct statement that summarizes the results or outcomes of the program activities.

When developing the report, consider the audience and how the information will be used. For example, ask yourself which of the following groups the data is intended to influence or inform:

- Board and officers of the agency
- Funding sources
- Agency managers and staff
- Agency volunteers
- General public

The goal of your evaluation report will also influence the report's content and appearance.

Consider whether the goal of the report is to:

- Justify funding
- Gain additional support
- Demonstrate effectiveness
- Identify strengths and weaknesses of the program
- Determine future planning
- Celebrate accomplishments

#### Key Questions To Ask

The number of questions you could ask to evaluate your volunteer program's effectiveness are almost endless. Limitations of time, money, and staff will focus the evaluation questions to the most essential ones to give you information to improve your program. Some possible questions:

- Is the program operating in conformity with its original design?
- Have adjustments been made as needed?
- Were the stated outcomes achieved?
- Is evaluation data being used for future planning?

## Volunteer Program Vision

Fast forward three years. You are walking into your organizations volunteer appreciation function to celebrate the great successes of your volunteer program. What are the two primary goals/objectives you will have achieved with your volunteer program?

1.

2.

## Action Steps to Success

1.

a.

b.

c.

2.

a.

b.

c.