



HandsOn
NETWORK

Keeping Them Coming: *Strategies to Find & Retain High Quality Volunteers*

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MASSACHUSETTS



SERVICE ALLIANCE

- 2

Meet & Greet

Share the following:

- Name
- Organization
- Current Position Title
- What was your most rewarding volunteer experience?



Pair and Share



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

Two Main Reasons **WHY** People Volunteer:

- They were asked
- They want to do something good for others



WHY Do People Stop Volunteering?

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



McClelland's Social Motivators

Motivations

Achievement

Affiliation

Influence

Five Elements to Volunteer Management





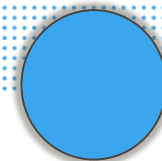
1. Planning a Volunteer Program

Elements of a Volunteer Program

Activity

- Put yourselves in order according to when the listed activity should happen in the management process
- Create a line
- When prompted read your card aloud
- Be sure and tell the group if you believe the activity is on-going





Elements of a Volunteer Program

1. Conduct Organizational Needs Assessments	6. Train Staff to Work With Volunteers	12. Sign Agency/Volunteer Agreement
2. Develop Policies and Procedures – Including a Risk Management Plan	7. Create Volunteer Application / Application Process	13. Orient Volunteers
3. Identify Appropriate Positions & Develop Volunteer Position Descriptions	8. Develop Outreach & Marketing Materials	14. Train Volunteers
4. Create Budget & Secure Resources for Volunteer Program	9. Create a Recruitment Plan / Recruit Volunteers	15. Place Volunteers in Positions
5. Create Agency/Volunteer Agreement	10. Review Applications	16. Supervise Volunteer – includes check-ins, evaluations, etc.
	11. Screen Volunteers – Include interviews, running checks, etc.	17. Recognize Volunteers
		18. Conduct Volunteer Evaluation / Collect Volunteer Feedback

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.

1. Create Detailed Volunteer Descriptions

Be specific. Answer the questions:



WHO

- is your organization?
- would be your ideal volunteer candidate?



WHEN

- does the volunteer position start and end?



WHY

- does your organization need a volunteer?
- should a volunteer be interested?



WHAT

- is the position?
- are the skills the volunteer needs?



WHERE

- does the volunteer position take place?



HOW

- will a volunteer be successful in their role?
- should a volunteer apply?



Policies and Procedures

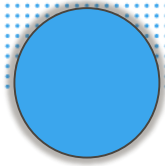
- Screening to include: application, background checks, interview, reference checks)
- Risk Management*
- Supervision
- Orientation
- Training
- Waiver forms
- Absentee Policy
- Sexual Harassment
- Confidentiality



Identifying 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?





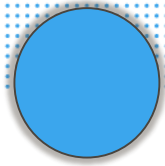
Identifying Resources

- **Examples of Direct Program Costs**

- Printed collateral such as manuals, documents to sign, recruitment flyers, brochures, etc.
- Background and MV checks
- Honorariums for trainers
- Recognition
- Refreshments

- **Other Resources**

- Staff time
- Staff professional development (Volunteer Management Training)
- Office space and equipment upkeep



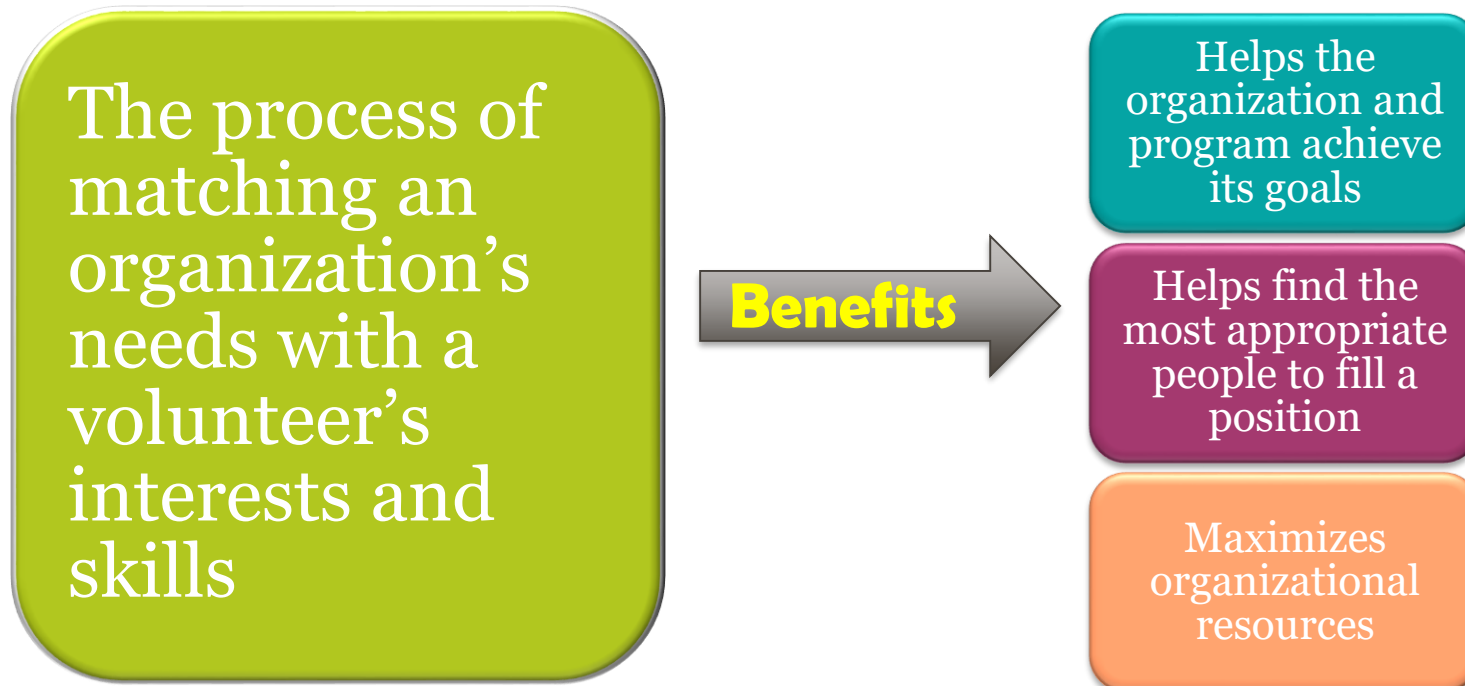
Identifying Resources

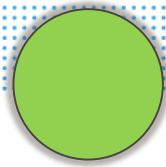
- How can you advocate within your organization to get the resources you need to be successful?
 - Create a volunteer advisory council chaired by a current board member
 - Host a focus group of volunteers and staff and present report or recommendations to supervisor or board
 - Prepare a quarterly report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



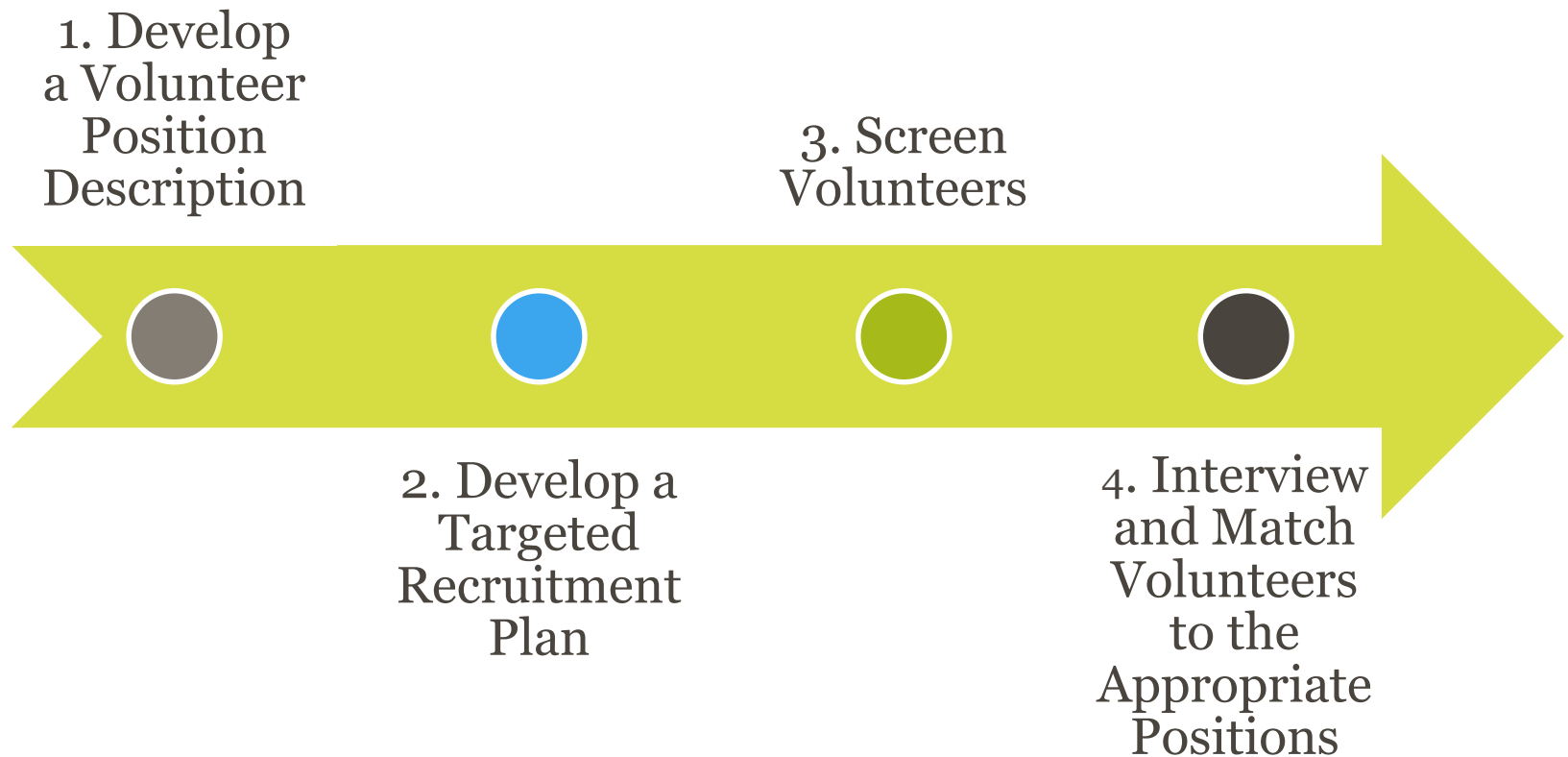
2. Recruiting and Placing Volunteers

What is Volunteer Recruitment:





Steps to Recruiting and Placing Volunteers



Step One

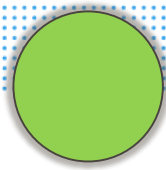
Develop a volunteer position description



Step 2

Developing Your Targeted Recruitment Plan





Recruitment

- **Warm Body Recruitment**

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

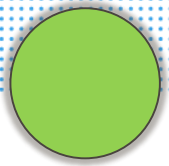


- **Targeted Recruitment**

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



Targeted Recruitment



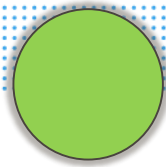
1. Identify and
Target Your
Audience &
their
motivations

2. Identify
Benefits and
Features

3. Craft a
Powerful
Message

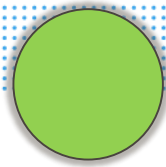
4. Design a
Communication
Strategy

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?

	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
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 Hammil – Mixing and Managing Four Generations of Employees ©Copyright 2005 Fairleigh Dickinson University.				

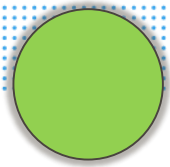


Step 2: Identify Benefits and Features

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.

Step 3: Craft a Powerful Message



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



Step 4: Design a Communications Strategy

- Different audiences require different communication strategies

- Be strategic about communication

- Identify specific ways to market your message

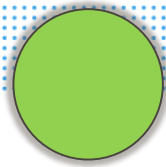
- Distribute brochures or posters
- Make public service announcements on television, radio, or newspaper
- Advertise! Advertise! Advertise!
- Speak to community groups (e.g., faith-based, neighborhood groups, community forums)
- Post to online venues (e.g., Websites, Twitter, YouTube, Facebook, blogs, 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.)



Step 3

Screen volunteers

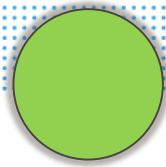




Screening

- 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

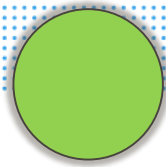




Screening

- 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

Screening Techniques



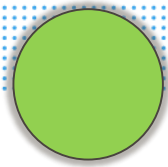
1. Application	Volunteers are asked to fill out this form to document basic information about the volunteer and it is used as a starting point for the volunteer interview process.
2. Reference Check	Contacting individuals who have personal and professional relationships with the volunteer and who have been suggested by the volunteer.
3. License Check	Verifying the existence and validity of a printed document that provides permission under a law or regulation to perform an activity.
4. Orientation	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
5. Supervision	The informal and formal process of guiding volunteers, managing expectations, and rewarding and recognizing volunteers.
6. Interview	The process of asking volunteers information to learn more about the individual so that you can assess whether the volunteer is a good match for the position.
7. Criminal Background Check	The review of any and all legal records containing any information collected and stored in the record repository.
8. Sex Offender Registry Check	The formal process of conducting a search on state and federal databases to verify that an individual is not listed as a convicted sex offender.

Step 4

**Interview and match volunteers to the
appropriate positions**



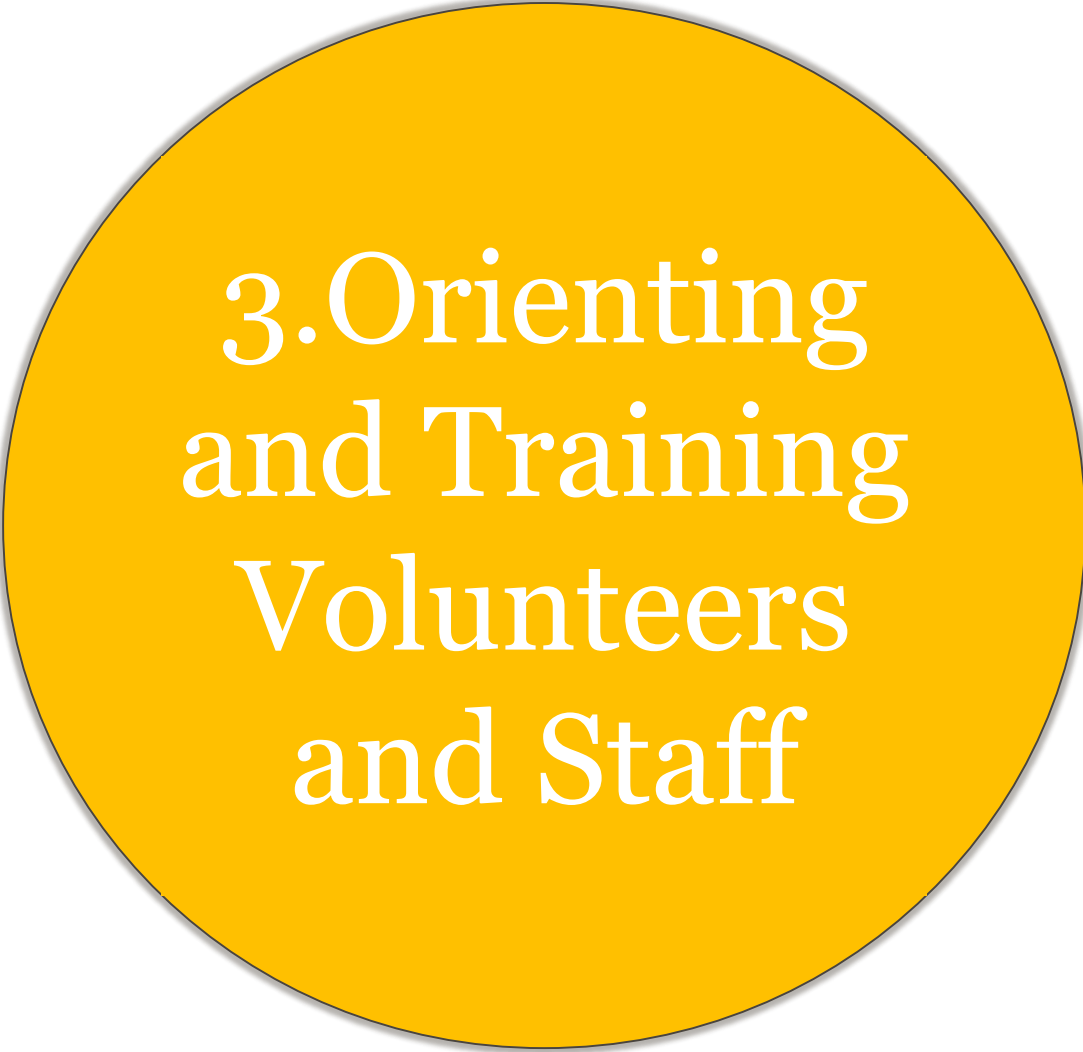
The Many Reasons Why We Interview Volunteers



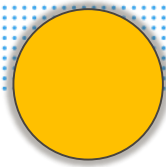
- Ensure applicant meets minimum requirements
- Determine support the individual needs (orientation, type of supervision)
- Develops relationship with applicant
- Applicant learns about the organization
- Applicant and interviewer determine fit for position – red flags
- Identify interests, motivation, skills
- Constraints / possible barriers
- Working style
- Articulate expectations
- Use the interview as a test - Can they arrive on time? Appropriate dress? Can they follow instructions?

Break





3. Orienting and Training Volunteers and Staff



Orientation & Training

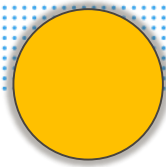
Orientation

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

Training

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

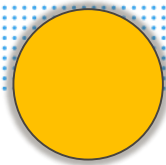




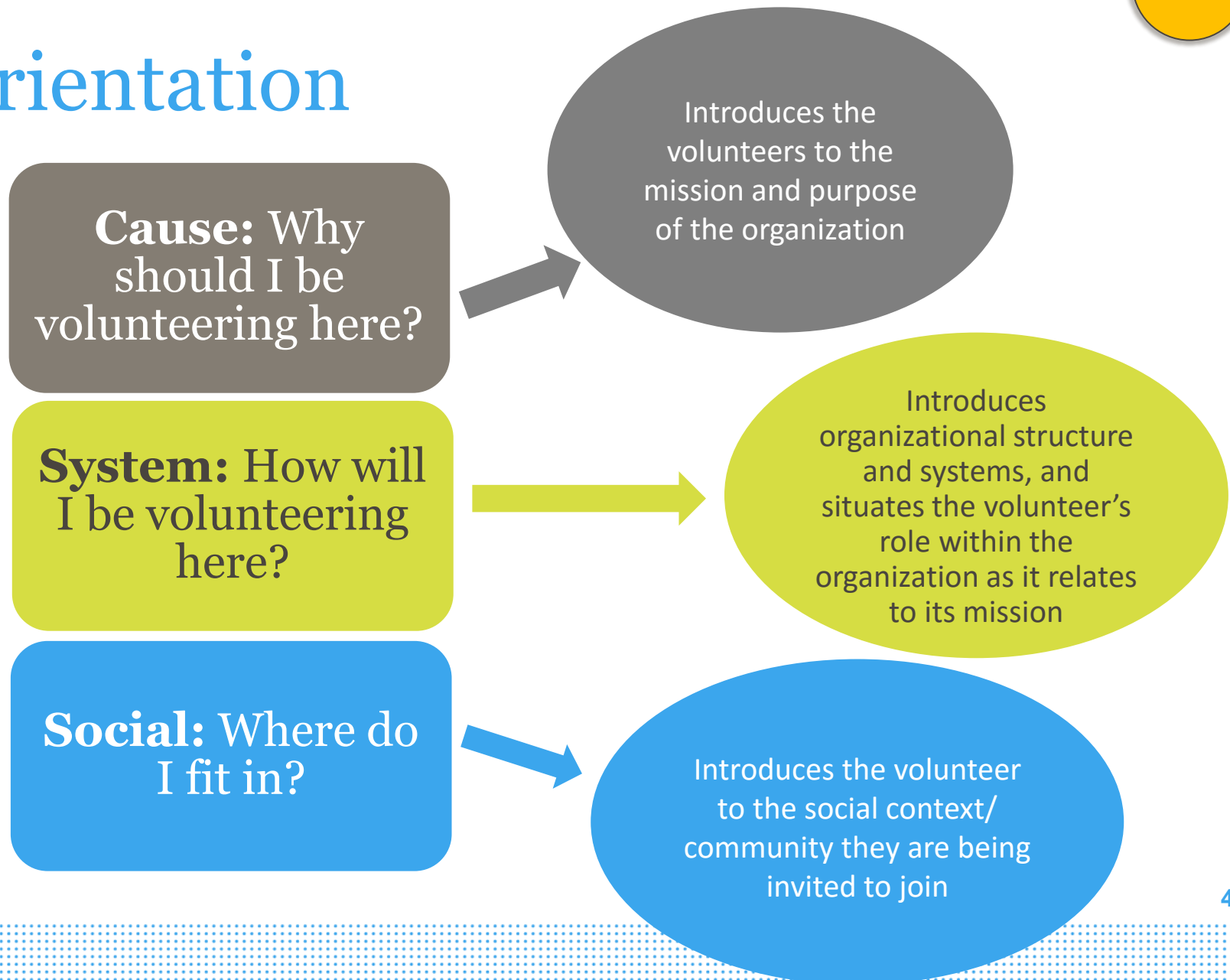
Carousel Exercise Questions

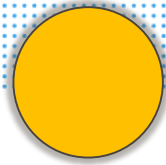
- What are some of the benefits of effectively orienting and training volunteers?
- What are the some of the consequences of NOT orienting and/or effectively training volunteers?
- What are the key components of a good volunteer orientation?
- What are the key components of a good training?





Orientation





Four Steps in Training Volunteers

Step 1: Identify Training Needs

Step 2: Design Training

Step 3: Deliver Training

Step 4: Assess and Refine Training

Training

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



Community



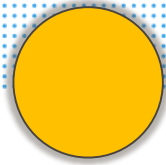
Skills



Attitudes

Knowledge





Four Steps in Training Volunteers

Step 1: Identify Training Needs

Step 2: Design Training

Step 3: Deliver Training

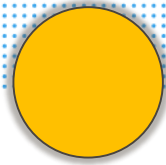
Step 4: Assess and Refine Training



Step 2: Design the Training

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
- Demonstrate immediate value



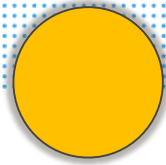
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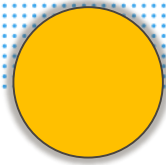
Step 4: Assess and Refine Training



Step 3: Deliver the Training

Four principle decisions for training delivery:

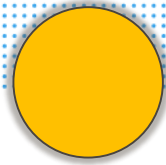
1. **When** to deliver the training
2. **Where** you will conduct the training
3. **Who** will deliver the training
4. **How** the training will be conducted



Step 3: Deliver the Training

When to train volunteers:

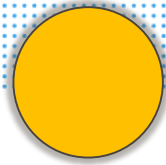
- Understand your volunteer corps
 - Mostly young professionals, college students, retired folks, a mix?
- Consider sending out a survey
 - Google doodle
- When can also relate to where



Step 3: Deliver the Training

Where to train volunteers:

- Convenient for volunteers
 - Your building (or the location where the volunteering will occur)
 - Consider public transportation/parking
- Consider what you need access to
 - Projector? Music? Kitchen?

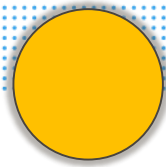


Step 3: Deliver the Training

Who will train volunteers:

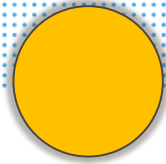
- Staff member who supervises volunteers
- Someone who is competent in both training and your organization
- Other staff, veteran volunteers, clients, professors, interns, content experts, others
- A mix!

Step 3: Deliver the Training



How to train volunteers:

- Keep all learning styles and attention spans in mind
- In-person vs online
- Interactive
- The training should be convenient for both volunteers and your organization
- Homework



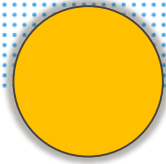
Four Steps in Training Volunteers

Step 1: Identify Training Needs

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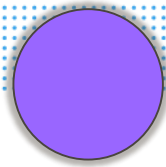


Step 4: Assess and Refine

- Written participant evaluations
- A reflection exercise at the end of the training
- Post-training survey
- Check-in sessions with volunteers
- Volunteer's performance evaluation



4. Supervising and Recognizing Volunteers



The Importance of Supervision

- Think of a negative supervisor experience you've had:
 - *What are some things a supervisor could do to avoid these situations from arising?*
- Think of a really great supervisor experience you've had:
 - *What actions did they take to make this a positive experience?*

Consequences of Poor Supervision

Negatively Impacts

- Volunteer retention
- Volunteer performance
- Volunteer well-being
- Staff buy-in and expectations
- Agency effectiveness
- Client satisfaction
- Agency image

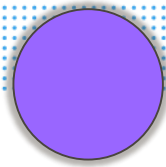


"I would like you to be more self-reliant, show more initiative, and take greater personal responsibility — but check with me first!"

Steps in Supervising Volunteers

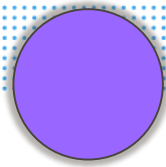
- **Step 1:** Define and Communicate Clear Expectations
- **Step 2:** Guide and Support Volunteers
- **Step 3:** Ensure that Volunteers Feel Rewarded and Recognized





STEP 1: Set Clear Expectations

- Volunteers need clear expectations in the following areas:
 - Policies, procedures and operations
 - Their responsibilities and functions
 - The agency's responsibilities toward them
- Actively review the information with vols
- Cover only items relevant to the volunteer
- Create a culture that encourages questions



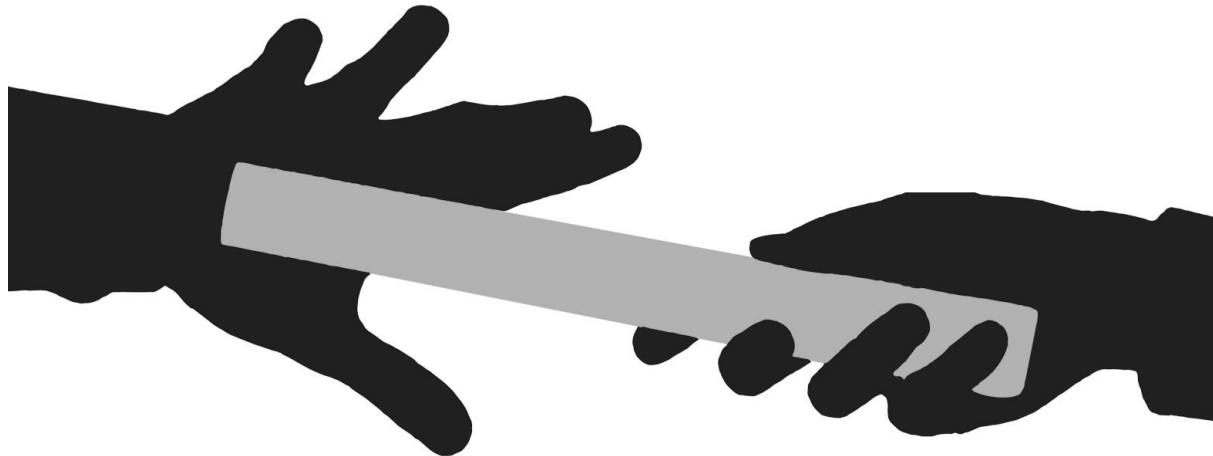
STEP 2: Guide & Support Volunteers

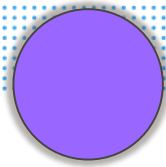
- Guiding and supporting volunteers means giving them:
 - Delegated tasks
 - Direction
 - Feedback
 - Freedom
 - Information and resources they need to perform their functions well



Delegation

- The opposite of micromanagement
- Zappos Model
 - Everyone is empowered to make the best decision in a given circumstance

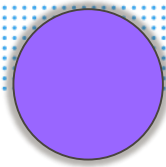




Group Exercise

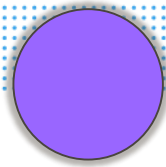
- Put yourself in your volunteers' shoes
- Assume you have volunteered at an organization once before
 - You were at the office for a few hours
 - You watched a five-minute orientation video
- You are now being asked to take on a different project and are about to be given instructions
- Out of the four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





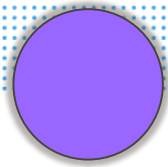
Guide and Support Volunteers

- If you take care of the person, they will take care of the task
- Provide guidance in a way that works for the volunteer
- Support, rather than control, volunteer efforts; control stifles enthusiasm
- Supervising volunteers is about providing direction and resources
- Everyone is different and all have their own preferred supervision style



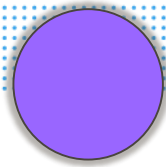
Dealing With Difficult Volunteers

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



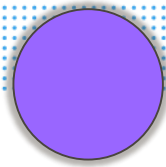
Scenarios

- Read the scenario related to volunteer supervision
- In your group, decide the best way to handle this situation
- Designate someone in your group to share



Volunteer Work Plan

- A visual tool that outlines the volunteer's responsibilities and helps you manage his or her volunteer workload and performance
- 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



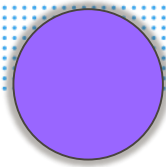
Elements of a Volunteer Work Plan

1. Placement Goal
2. Objectives
3. Action steps
4. Timeframe
5. Supervision
6. Potential resources (e.g., people, partners, technology and financial)

STEP 3: Volunteer Recognition

- Create a positive environment
- Provide structure
- Treat volunteers well
- Ensure their work is personally rewarding





Recognition Ideas

- Host a party for volunteers and their friends/families
- Plan to hold one recognition event per year
- Tell the volunteer's work supervisors about their involvement
- Work with local media to highlight outstanding volunteer stories
- Highlight a volunteer on your website/newsletter
- Engage senior staff to send a thank you note to the volunteer
- Secure a proclamation from your governor or mayor to honor a special volunteer
- **Write a letter of recommendation**

A large red circle with a thin black outline, centered on the slide. Inside the circle, the text '5. Evaluating Volunteers/ Programs' is written in white serif font.

5. Evaluating Volunteers/ Programs

Why Evaluation Is Important



Gain Insight About the Program
and Its Operations



Improve Practice



Assess the Effects of the Program



Build Program Capacity Through
Increased Funding and/or Skill

Volunteer Evaluation

- Understand the Volunteer Experience

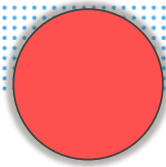
- ☐ Ask the volunteer directly (survey, interview)
- ☐ Ask those that the volunteer works with (staff and customers)
- ☐ Observe



- Impact

- ☐ What has volunteer accomplished – projects, outputs, hours
- ☐ How has the volunteer grown
- ☐ Talk to customers





Data Collection Methods & Tools

- **The Program Logic Model:** logic models allow you to state your goals with both short term and long term measurement tools and resources required. You can evaluate your success and measure your outcomes.
- **Focus groups:** these are an opportunity to have dialogue, focusing on a small group of targeted audiences that will give instantaneous feedback.
- **Questionnaires, surveys and checklists:** this is good when you need to get information quickly and easily. I suggest a combination of open ended and check off questions, and be sure you don't make it too long. Technology has made doing surveys very easy, and there are many websites available that can help you develop and summarize evaluation questionnaires.
- **Interviews:** an opportunity to fully understand a subject.
- **Observation:** can be used to gather accurate information about a program.
- **Case studies:** can be used to fully understand a system from beginning to end. For example, understanding the experience that a volunteer has from first contact to retirement with your organization.

Using Evaluation Data

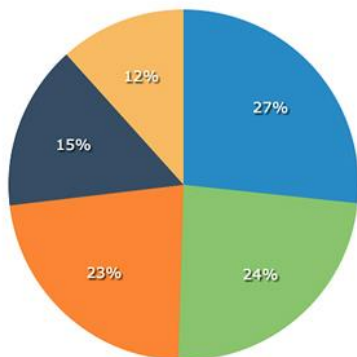
The Volunteers say... Volunteer Recognition

Please rank the way you prefer to be recognized as a volunteer. Put your preferred method on top, and only include recognition you personally would appreciate.

	Score*	Overall Rank
Personal or Professional Growth Opportunities	1112	1
Physical Items (gear, certificates, etc)	901	2
Personal Note of Thanks	808	3
Praise and recognition	807	4
Access to Special Events	687	5

Total Respondents 339

*Score is a weighted calculation. Items ranked first are valued higher than the following ranks, the score is the sum of all weighted rank counts.



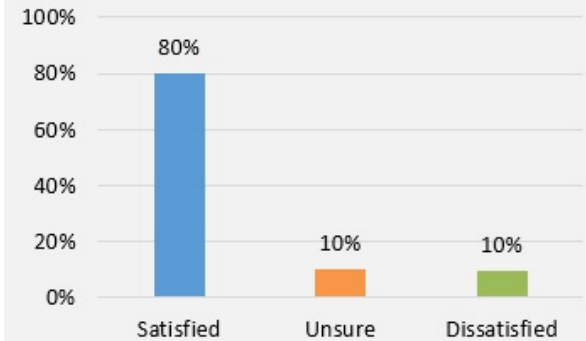
- Convenient scheduling
- Proof of work's impact
- Professional development
- Social/networking events
- Discounts at local businesses

"I am more than proud that I was a part of it for five weeks, and it was an honour to do my best to help EW breathe a little easier, and to be a part of something truly good. I wish any prospective volunteer all the same life-enhancing experiences I had while I was there."

- Chris Hetke

[Read more volunteer experiences](#)

Satisfaction with my role as a CFA volunteer



Impact of IBM Corporate Service Corps

Results indicate huge leadership development & management support



Managers of ICV participants reported employees showed:



Participants reported:

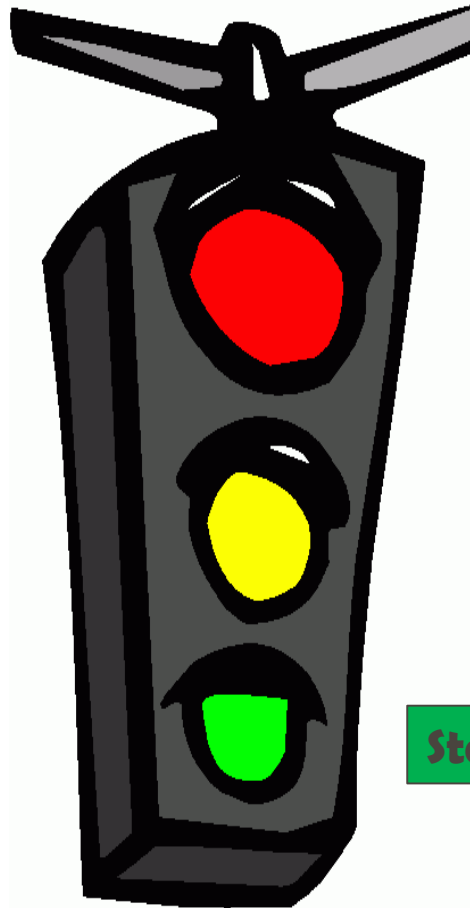


*IBM Survey of CSC participants and managers



**"Mr. Osborne, may I be excused?
My brain is full."**

Reflection Exercise



Stop Doing or Change

Continue Doing

Start Doing