



Volunteer Engagement Resource Toolkit

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Instructor:

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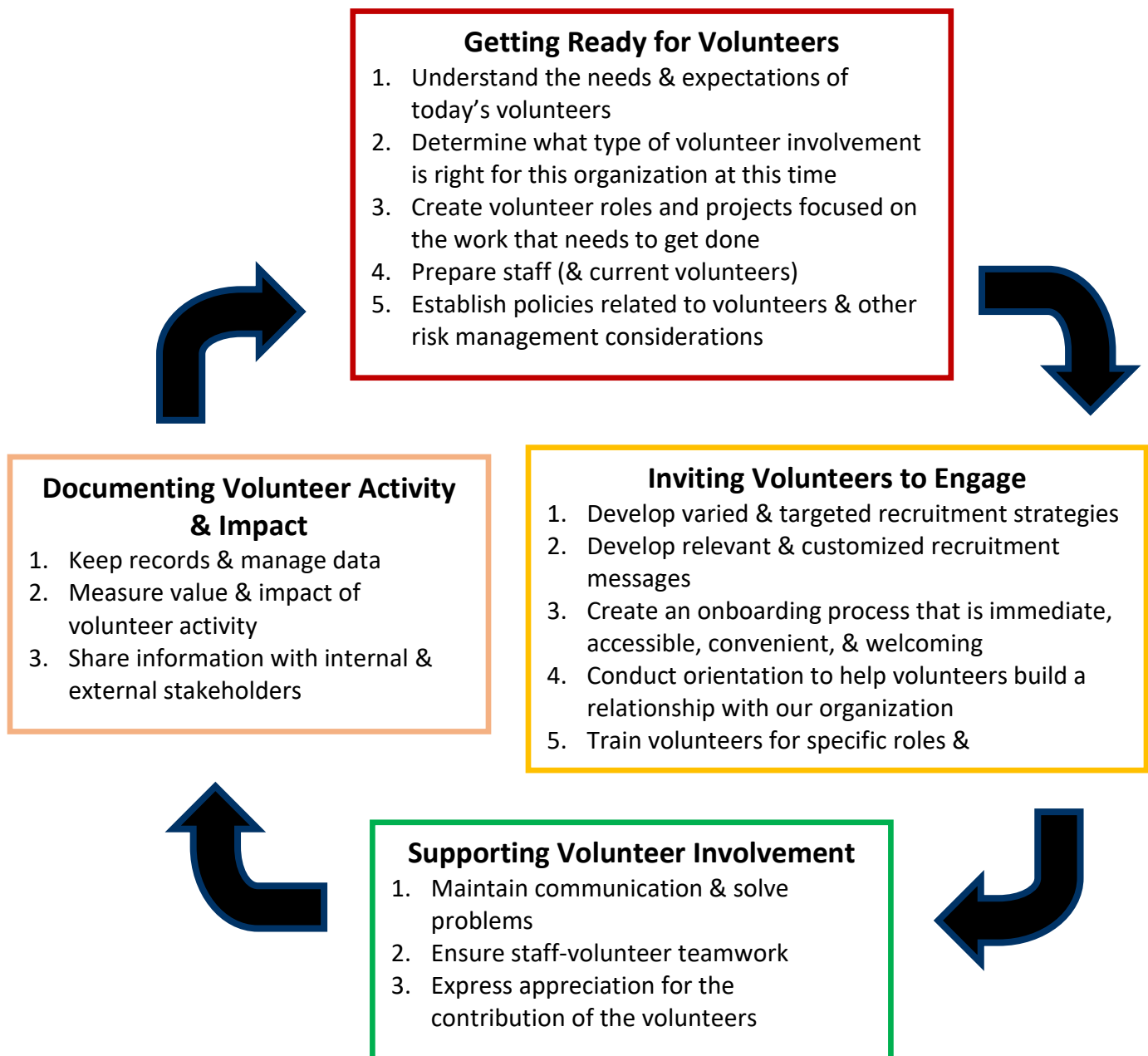
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Elements of Effective Volunteer Engagement

These components ensure that:

- ✓ The work done by volunteers supports and enhances organizational priorities.
- ✓ Volunteers have a positive, meaningful experience and are likely to sustain their relationship with the organization.



Getting Ready for Volunteers

- ✓ **Template for effective volunteer role descriptions**
- ✓ **Sample volunteer role descriptions**
- ✓ **Volunteer engagement practices that support risk management**
- ✓ **Developing policies and procedures related to volunteer engagement**
- ✓ **Best practices related to discipline and dismissal of volunteers**

Template for Effective Volunteer Position Descriptions

Title (*meaningful, understandable*)

Goal/Purpose (*why is this position important? connection to mission?*)

Responsibilities (*major task areas or activities*)

Desired Results (*specific outcomes; indicators of success*)

Expectations (*general “rules” for how the role is performed*)

Qualifications/Expertise/Skills/Restrictions (*as objective as possible; ideal vs. critical*)

Time Commitment (*duration; weekly or monthly hours; critical meeting schedule*)

Location/Site (*where the work must/can be done*)

Supervision and Support (*reporting structure, training provided, other resources*)

Benefits (*what’s in it for me, the volunteer? Why should I say “yes”? How is this different from other volunteer positions I’m considering? Be specific.*)

Sample Volunteer Position Description – ReEstablish Richmond (refugee resettlement mission)

POSITION TITLE: Sewing Instructor/Volunteer	
TYPE OF SERVICE: Direct or Indirect	PROGRAM: Economic Empowerment
CONNECTION TO MISSION: The Sewing Program provides skills-based training to women interested in learning to sew and support seeking employment in a sewing related field helping them work towards economic goals and self-sufficiency.	
LOCATION: Virtual check ins or at client's home to drop off materials	TIME COMMITMENT: Varies
<p>POSITION DESCRIPTION:</p> <ul style="list-style-type: none"> • Instruct and/or support students virtually as they learn or develop sewing skills • Provide guidance and feedback for sewing projects • Prepare and distribute project materials to clients home following health and safety guidelines <p>RESPONSIBILITIES AND EXPECTATIONS:</p> <ul style="list-style-type: none"> • Check in with program director weekly for a progress report on client(s) assigned to you • Report your Volunteer hours via the Volunteer Portal once a month 	
<p>REQUIREMENTS / QUALIFICATIONS:</p> <ul style="list-style-type: none"> • Strong sewing skills • Willingness to work through potential language barriers and in-ability to meet in person for instruction • Ability to assist in virtual classroom instruction digitally • Experience teaching sewing (in any capacity) preferred 	
<p>IMPACT:</p> <ul style="list-style-type: none"> • Clients will express deep gratitude to you for helping them learn or refine their sewing knowledge and skills • Help students achieve ownership of a practical skill • Many of our program volunteers bond with clients through sewing and become friends outside of class • Support of the ReEstablish Richmond staff throughout your volunteer experience 	

Connecting refugees and new immigrants to the resources needed to establish roots, build community, and become self-sufficient.





Volunteer Role Description General Admin Support

In partnership with families, SOAR365 creates life-fulfilling opportunities for individuals with disabilities, annually serving over 1,400 people and their families.

Category of Service: Administrative Support	Time Commitment: Ongoing (Ideal commitment is one morning or afternoon shift per week for a minimum of eight weeks)	Locations: SOAR365 @ Saunders
Onboarding: Orientation, Application, Interview, (Background Check for certain tasks), Signed Documents	Appropriate for: Individuals (College Students, Young Professionals, Adults)	Available Shifts: Monday - Friday 9:00-12:00 or 1:00-4:00
<p>"As a person with a mobility impairment, I understand first-hand the importance of the services SOAR365 offers. I started volunteering with SOAR365 because I wanted an opportunity to make a real difference, even if I only have a few extra hours a week to do so. Being able to work on administrative tasks in my free time and seeing how they actually help SOAR365 is a very rewarding experience. It's very fulfilling, and I feel grateful for the opportunity."</p> <p>Bridgette Taylor / SOAR365 Administrative Support Volunteer</p> <p>About SOAR365: https://www.soar365.org/</p>		

Administrative Support Volunteers team up with our administrative staff to do essential behind-the-scenes work that ranges from assistance with mailings, supply inventories, and packet assembly to phone reception, data entry, and donor research.

Required skills include:

- Have a willingness to learn along with professional drive and flexibility
- Possess a level of comfort and fluency in a professional office environment
- Have excellent verbal and written communication skills.
- Have excellent Microsoft Office skills
- Have reliable transportation

To Apply please contact:

Alison Jones-Nassar, CVA
Volunteer Engagement Manager, SOAR365

804-665-1214
alison.jones-nassar@soar365.org



SOAR365 Social Media Virtual Internship – Fall 2020

Organizational Description

In partnership with families, SOAR365 creates life-fulfilling opportunities for individuals with disabilities, annually serving over 1,400 people and their families. Founded in 1954, SOAR365 is an organization created by families, for families; an organization that has grown to provide a continuum of programs and services for individuals with disabilities across the lifespan.

With multiple locations throughout central Virginia, SOAR365 programs span the lifecycle and assist people with disabilities to live happy, successful and meaningful lives. Programs and services include: Pediatric Therapy Services; Adult & Youth Day Services; Workforce Development Services; and Residential (Summer Camp and Respite) Services.

Marketing & Communications Description

The SOAR365 Marketing & Communications department is responsible for a variety of initiatives, including printed and digital communications that promote programs, services, events, fundraising opportunities, and volunteer engagement. Marketing employs an aggressive Public Relations outreach to local and regional media, supported by social media and a targeted print and digital advertising to build awareness for SOAR365 programs and services.

Intern Responsibilities

SOAR365 is seeking a social media intern to help a growing marketing department within a large human services agency achieve greater visibility and engagement across a variety of social media channels (Facebook, Instagram, LinkedIn, SOAR365's web site, etc.)

Key responsibilities include collecting information through and collaborating with departmental staff at multiple locations, writing/developing content, editing photos, posting according to schedules, and contributing to the organization's social media strategy.

Skill set:

- Ability to understand and connect a variety of SOAR365 audiences (parents/caregivers, donors, business customers, volunteers, larger community)
- Adept at utilizing all social media channels, including features such as boosting and ads
- Knowledge of social media scheduling and management tools, such as Hootsuite
- Ability to use analytics/data to drive social media strategy
- Creative mindset; ability to identify newsworthy posts and execute
- Ability to collaborate with internal staff at multiple locations
- Strategic thinking & tactical execution
- Strong writing and editorial skills, especially for social media channels
- Good eye for engaging visual imagery and photography

This position reports directly to the VP of Marketing & Communications.

(continued)

Time commitment

- This position begins in September 2020 and concludes in December 2020.
- A minimum of 10 hours per week is preferred.
- Schedule can be negotiated.
- Please note that this is an unpaid internship.

How to Apply

Please send resume, cover letter, and work samples to:

Alison Jones-Nassar, CVA

Volunteer Engagement Manager, SOAR365

804-665-1214

alison.jones-nassar@soar365.org

Volunteer Administration Practices That Support Risk Management

- ☑ **Position Description**
 - Provides the parameters within which the volunteer is authorized to act
 - Helps define organization's responsibility
 - Defines criteria for recruitment and training
 - Facilitates the screening process
 - Helps others understand the volunteer role and prevent "leakage"
 - Enables volunteer to understand the role, relationships, and boundaries
 - Provides guide for evaluation and accountability

- ☑ **Application Form**
 - Models good personnel practice
 - Ask only what you need to know
 - Can serve as first level of screening

- ☑ **Screening**
 - Tools: interviews, official documents, references, background checks
 - Design appropriate screening based on identification of risks
 - Determine what will make an applicant ineligible before checking records
 - Be sensitive to cultural differences
 - Include others in the process

- ☑ **Orientation & Training**
 - General information and expectations
 - May serve as additional screening tool for intense, sensitive or complex volunteer roles
 - Duties to be performed, and activities not allowed
 - Identify risks involved and ways to minimize them
 - Explain need for confidentiality, ethics & recordkeeping
 - Make supervisors aware of same information
 - Volunteer handbooks are written confirmation of important information re expectations and rules

- ☑ **Supervision**
 - No direction/supervision = chaos, potential for harm
 - Too much rigidity = little room for volunteer creativity and energy
 - Effective supervision = balance of individual & organizational needs
 - Ensure security and accessibility of volunteer records
 - Remind volunteers why rules exist and the implications of ignoring them
 - Use progressive discipline

Resource: Nonprofit Risk Management Center, www.nonprofitrisk.org

Developing Policies and Procedures Related to Volunteer Engagement

DEFINITIONS

Policy:

- A statement of operating intent, explaining the “what” and “why” of an action or function
- Broad enough to allow some degree of flexibility in its interpretation
- Must be approved by the Board of Directors

Procedure:

- Set of statements prescribing “how” the policy is to be implemented
- Usually very detailed, limiting actions of those involved
- Can be changed by staff/volunteers as needed over time

- *How does your organization define these terms?*
- *What types of policies and procedures already exist in writing?*
- *Where are they kept? Who is responsible for keeping them up-to-date?*
- *Is there a standard format?*
- *How/when is the Board involved?*

MINIMAL / BASIC Policies and Procedures should address:

- ✓ Initial assessment and screening
- ✓ Assignment to and training for appropriate work responsibilities
- ✓ Ongoing supervision, support and evaluation
- ✓ Grounds for dismissal
- ✓ Opportunities for advancement

ELEMENTS TO INCLUDE in P&P documents

- Individual/position/committee responsible for drafting and maintaining
- Dates of review, changes, and Board approval
- Numbering system for ease of locating specific policies

SAMPLE TABLE OF CONTENTS for VOLUNTEER-RELATED POLICIES

1. General

- 1.1 Mission/vision/philosophy for why volunteers add value to the organization
- 1.2 Scope of these policies
- 1.3 Definitions of “volunteer”, “intern”, and other terms being used
- 1.4 Employees as volunteers
- 1.5 Board members as direct service volunteers

- 1.6 Interns
- 1.7 Clients and relatives a volunteers
- 1.8 Mandated service volunteers
- 1.9 Youth and families as volunteers
- 1.10 Other special case volunteers (virtual, pro bono, volunteers with disabilities, etc.)
- 1.11 Scope of volunteer involvement throughout the organization
- 1.12 Volunteer rights and responsibilities
- 1.13 Recordkeeping and documentation
- 1.14 Risk management / liability

2. Recruitment and Onboarding

- 2.1 Position descriptions
- 2.2 Staff requests for volunteers
- 2.3 Recruitment
- 2.4 Application
- 2.5 Interviewing
- 2.6 Availability of suitable volunteer positions
- 2.7 Health screening
- 2.8 Criminal records check
- 2.9 Placement with at-risk/vulnerable clients
- 2.10 Certificate of ability
- 2.11 Falsification of information
- 2.12 Placement
- 2.13 Term of work agreement
- 2.14 Staff participation in interviewing and placement
- 2.15 Acceptance and assignment
- 2.16 Probationary period
- 2.17 Re-assignment
- 2.18 Professional services
- 2.19 Length of service
- 2.20 Leave of absence

3. Training and Development

- 3.1 Orientation
- 3.2 Position-specific training
- 3.3 Staff involvement in orientation and training
- 3.4 Volunteer involvement in orientation and training
- 3.5 Continuing education
- 3.6 Opportunities for advancement

4. Supervision and Evaluation

- 4.1 Requirement of a supervisor
- 4.2 Volunteers as supervisors of volunteers
- 4.3 Volunteer-staff relationships
- 4.4 Acceptance of volunteers by staff
- 4.5 Volunteer management training for staff
- 4.6 Volunteer involvement in staff evaluation

- 4.7 Evaluation of volunteer/staff teams
- 4.8 Lines of communication
- 4.9 Performance evaluation
- 4.10 Written basis for evaluation
- 4.11 Staff responsibility for evaluation
- 4.12 Corrective action
- 4.13 Dismissal of a volunteer
- 4.14 Reasons for dismissal
- 4.15 Notice of departure or re-assignment of a volunteer
- 4.16 Resignation
- 4.17 Exit interviews
- 4.18 Communication with the volunteer management department/leader

5. Volunteer Conduct

- 5.1 Conflict of interest
- 5.2 Confidentiality & privacy
- 5.3 Standard of conduct
- 5.4 Dress code
- 5.5 Timesheets
- 5.6 Media contact
- 5.7 Use of social media
- 5.8 Absenteeism
- 5.9 Substitution
- 5.10 Standards of performance
- 5.11 Refusal of assignments
- 5.12 Harassment
- 5.13 Alcohol and drugs
- 5.14 Acceptance of gifts and gratuities
- 5.15 Concerns and grievances
- 5.16 Injuries
- 5.17 Partisanship
- 5.18 Proselytizing
- 5.19 Reimbursement of expenses

6. Support and Recognition

- 6.1 Reimbursement of expenses
- 6.2 Access to organization property and materials
- 6.3 Insurance
- 6.4 Formal recognition
- 6.5 Informal recognition
- 6.6 Volunteer career paths
- 6.7 Recognition of staff who work with volunteers

DISCIPLINE AND DISMISSAL: POLICY AND PROCEDURE

The extent of complexity and responsibility of the work we now assign to volunteers demands that organizations have clear and comprehensive policies and procedures governing volunteer involvement. Nowhere is this more important than for the topics of volunteer discipline and dismissal.

Your Policy Might Cover The Following

- ⇒ establish agency's right to terminate volunteer's involvement
- ⇒ this right is based on agency mission and service to clients as highest value
- ⇒ cite sample grounds for dismissal
- ⇒ cite preferred route of progressive discipline where time and circumstances allow
- ⇒ note agency's commitment to investigate and document all performance concerns and incidents which may serve as grounds for dismissal
- ⇒ note agency's commitment to always hear volunteer's side
- ⇒ note who has authority to fire
- ⇒ outline who needs to be informed either of intent to dismiss (in advance), for information or approval, or who needs to be notified of the act after it has taken place
- ⇒ formal notice of termination will be presented in writing to volunteer upon termination, or through mail within specified time period
- ⇒ outline appeal process if any

YOUR PROCEDURE MIGHT INCLUDE THE FOLLOWING

- ⇒ who has authority to dismiss?
- ⇒ face-to-face meeting
- ⇒ witness present?
- ⇒ protocol for personal safety protection
 - security in vicinity
 - clear other personnel from area
 - security escort from premises
 - notification of authorities if transgression has been violent, criminal, abusive
- ⇒ recovery of agency property (keys, computer disks, manuals, identification, uniform)
- ⇒ notification of relevant agency personnel and clients, and public and other agencies where necessary

A CHECKLIST ON DISCIPLINE AND DISMISSAL

Complete the following checklist in the event that you consider disciplining or dismissing a volunteer. For each question in the left column, check a *yes* or *no* in the right column. If you check *no*, then you have additional action to take before dismissal is warranted or can proceed.

QUESTIONS	ANSWERS	
Have You:	Yes ()	No- ()
1. Conducted an interview with the employee as a first step in the disciplinary process?	()	()
2. Made sure in your interview with the employee that you		
a) informed the employee of the circumstances leading up to the interview?	()	()
b) indicated specific examples of problem behaviours?	()	()
c) gave the employee a chance to respond to the circumstances and examples you pointed out?	()	()
3. Provided specific, concrete recommendations for improvement?	()	()
4. Prepared a memo documenting the interview and outlining the steps agreed to by the employee to bring about a change in behaviour?	()	()
5. Agreed on a date for a future discussion about the problem behaviour with the employee?	()	()
6. Documented the date for the agreed on discussion and allowed employee comments (if any)?	()	()
7. Signed the memo?	()	()
8. Had the employee sign the memo?	()	()
9. Retained a copy of the memo for your files?	()	()
10. Given the employee a copy if he or she requests one?	()	()
11. Sent a copy of the memo to your supervisor and/or the Personnel Department?	()	()
12. Prepared a written warning(s) as a second step in the disciplinary process, assuming performance or behaviour does not improve?	()	()
13. Contacted your supervisor and/or the Personnel Department if termination is contemplated?	()	()

Inviting Volunteers to Engage

- ✓ **Words Matter! A recruitment lesson from the paid world**
- ✓ **Sample recruitment content & messages**
- ✓ **Create a customized menu of volunteer opportunities**
- ✓ **Volunteer recruitment plan worksheet**
- ✓ **Tips for diversifying your volunteer corps**
- ✓ **Sample volunteer application**
- ✓ **Sample volunteer onboarding process**
- ✓ **Sample first day checklist for new volunteers**

Words Matter! A Recruitment Lesson from the Paid World *(Chronicle of Philanthropy)*

Director of Development and Marketing

The NEW Koch Family Children's Museum of Evansville (CMOE) – scheduled to open in downtown Evansville, IN this September – is seeking a Director of Development & Marketing looking to grow professionally while building on the museum's ten-year record of success.

REQUIRED QUALIFICATIONS AND EXPERIENCE:

- Working knowledge and minimum three years practical experience with major gifts, annual giving, membership programs, and grants
- Ability to develop simple and creative marketing strategies for a unique organization
- A gift for writing in a clear and compelling fashion
- An ease and enthusiasm for representing the Children's Museum in a variety of public forums
- An eagerness to work collaboratively as part of a dynamic management team
- A value system and professional style that is ethical, diplomatic, persuasive and credible – with a healthy dose of good humor!
- Must like kids, working independently, kids, multitasking, kids, brainstorming...oh, and did we mention kids?
- College degree or equivalent life experience required.

The organization's annual operating budget is \$700,000 with a staff of 7 full-time employees and an 18-member Board of Directors. It recently completed a highly successful capital campaign that exceeded its goal and enjoys broad and enthusiastic community support.

COMPENSATION AND AMENITIES:

CMOE is located in the historic downtown district of Evansville, IN, on the banks of the Ohio River. The metropolitan area has a population of 250,000 – small enough to be friendly, large enough to boast all the big-city amenities, including 3 universities, 2 medical centers, a flourishing cultural community, several major corporate headquarters, parks good schools, and the oldest American professional baseball park in continuous use (along with Boston's Fenway). The cost of living, especially housing, is among the lowest in the nation and the region boasts a near nonexistent crime rate. Located at the very southern tip of Indiana on the Kentucky and Illinois state borders, the community's character reflects a blend of Mid-western down-to-earth and Southern hospitality, with a moderate climate to match. Chicago, St. Louis, Louisville, Birmingham, and a host of other big cities are within easy driving distance.

The new Children's Museum is located in a five-story, newly-restored Art Deco building that has been placed on the National Registry of Historic Landmarks. The exhibits have been created by one of the top children's museum design firms in the world.

An attractive and competitive salary/benefits package commensurate with experience will be offered to the right candidate.

We encourage you to forward this announcement to others who may be interested.

TO APPLY: Please apply by forwarding cover letter, resume and 3-year salary history by August 15th to jobs@cmoekids.org. All applicants will receive a prompt reply.

Sample Recruitment Messages

Licensed Medical Professionals

For the most current information about volunteering during the COVID-19 crisis, please [click here](#).

Volunteer doctors, nurses, dentists, dental hygienists, and other licensed professionals provide direct patient care to our clients in the Free Clinic, which is open Monday through Friday. Our patients benefit from the generous donation of time from volunteers. We are looking for volunteers who:

- can make a 6-month commitment
- are available once a week, every other week, or once a month
- work a 3-hour time slot

Currently, our greatest need is for volunteer dentists and volunteer dental hygienists. Please check back for other volunteer licensed professional opportunities. We update this page as our needs change.

For more information, please see [Information for Licensed Health Professional Volunteers](#) and our [Volunteer Handbook](#).



Share your dental hygiene skills and give a smile to Goochland residents in need.

May 17-18, 2019

- Vendors
- Lunch and snacks provided
- T-shirt and other giveaways
- Meet other dental professionals

CE lunch and learn

To register, call Katie Alvis
at 804-556-0709 or email her at
kalvis@goochlandcares.org

Half or full day opportunities

**GOOCHLAND
CARES**
Free Clinic and Family Services

MEET OUR VOLUNTEERS!

Meet Thomas Leach!



"My main goal is to obtain a part-time paying job, but I also want to continue volunteering with SOAR365 because it allows me to help others and put my skills to good use. I am a people-person and volunteering gives me opportunities to be sociable while also helping me feel like I am making a valuable contribution."

Meet Bre Armbrust!

"I have really enjoyed volunteering so far. I find the staff to be very helpful and I hope that the participants have enjoyed the classes. Two participants even came up with yoga poses in the chair that we all ended up doing. I think I smiled for almost the entire time that I was there."



Meet Sherri McCaul!



"Camp Baker is an incredible place to volunteer. This past summer I helped to serve lunches [every Thursday]. What fun it was to observe young counselors and camp participants interacting! I was amazed at the exuberance of so many of the campers. Watching a couple of ladies just naturally break into singing and dancing warmed my heart, making me want to volunteer more. After completing the required [volunteer onboarding steps], I began volunteering at Camp Baker with the Day Program participants. I continue to be impressed by the warmth of the program participants and enjoy seeing that each person definitely has his/her own distinct personality. The staff members are professional and respectful, and also fun to work with! I encourage anyone who loves people to volunteer with SOAR365."

Create A Customized Menu of Volunteer Opportunities

DECISION FACTOR	VARIATIONS	ROLES/ACTIVITIES
TIME	Continuous, regular	
	2 hours per week	
	Early morning or Evening	
	Weekends	
	Short-term, episodic	
	On-call, short notice	
	Anytime, anywhere (virtual)	
DESIRE TO LEARN	About our industry/field/issue	
	About careers	
	About people	
	Gain skills and experience	
WHO	Individuals	
	Teams of 2-5	
	Groups of 10-25	
	Families	
TYPE OF ROLE	Work with a team or group	
	Work independently	
	Solve a problem	
	Coach others, lead a team	
	Advocate for others	
	Share a specialized skill	
	Help where needed most	
LOCATION	Main office	
	Satellite locations	
	At home	

Volunteer Recruitment Plan Worksheet

Volunteer Role/Project Title: _____

Needed: _____

Target Audience	Possible Places/Ways to Locate This Audience	Best Recruitment Technique(s)	Key Message Points

Tips for Diversifying Your Volunteer Corps (age, ethnicity, geography, ability, etc.)

- ❖ Do some research: Talk with a few individuals who represent the new audience you are trying to reach. Ask them for advice about how to communicate with others and invite them to get involved. If you have a current volunteer and you want more from that particular community, ask for their advice and assistance.
- ❖ Be aware of terminology: The term “volunteering” may mean different things to those from another culture or may not be a familiar concept. “Helping” or “Giving a hand to others” may be better understood. Ask about their traditions of “service to others”.
- ❖ Be sensitive to language differences: Potential volunteers from other countries need to know if their English-speaking skills are sufficient. Be clear about whether this is a requirement for any particular volunteer role.
- ❖ Consider implications of “confidentiality”: This concept may be new for some individuals.
- ❖ Be prepared for a wide range of experience with volunteering, and with employment: Don’t make assumptions about skills or comfort with a structured environment. Adjust your training as needed.
- ❖ Diversify your image: Include photos of a wide variety of people – in your website, social media, PP slides, publications.
- ❖ Consider a “pilot” project: Start by recruiting a few volunteers from a new group/community and pay attention to any challenges that arise. Be honest about your desire to learn from their experiences.
- ❖ Help current volunteers accept newcomers: Be transparent about why you are looking to recruit new types of people and listen to any concerns or questions. This will help to ensure that your organization’s “welcome” is sincere and smooth!

Sample Volunteer Application / Interest Form

Culpeper Renaissance, Inc. Volunteer Form

Name _____

Mailing Address _____

Telephone (Daytime) _____ (Evening) _____ (Cell) _____

E-mail Address _____

Indicate how you prefer to be contacted _____

Please state your preference for the following:

Volunteer the day of event(s) only Serve on a committee for an annual event

Serve on a committee that meets regularly (Please check the committee of your preference. See attached an explanation of each committee):

Design Committee Economic Vitality Committee Promotions Committee

Promotions Sub Event Committees: 3rd Thursday Committee, Culpeper Block Party; Hop N Hog,

Holiday Open House, Gnarly Culpeper Block Party,

Culpeper Downtown Carnival

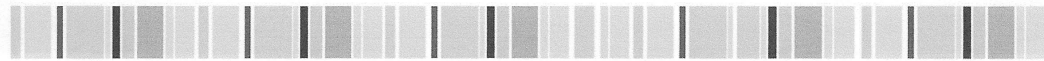
What are your interests? (Examples: typing, artwork, graphic design, crafts, planting, visiting businesses, tracking volunteer hours, etc.) _____

Thank you for completing this form. We are thankful you are willing to volunteer your time and talent to CRI and we want you to enjoy the time you give to us.

(Signature) _____ (Date) _____



127 West Davis Street | Culpeper, VA 22701
phone (540) 825-4416 | fax (540) 825-7014
welcome@culpeperdowntown.com
www.culpeperdowntown.com



Sample Onboarding Process

Provide Help

Share your time and talent with your neighbors by volunteering with us.

The safety of clients, volunteers, and staff is our priority.

Onsite volunteer opportunities are now available. Are you interested in returning to volunteer at GoochlandCares? Are you a new volunteer? [Please click here for a virtual tour](#) to find out more about volunteering onsite.

Volunteer Application Process

Our goal is to match your interest, skills and availability with our program needs.

- Complete the [Volunteer Application](#).
- Attend a Volunteer Orientation. [Please click here to register for a session](#).
- Attend an "on the job" training related to the volunteer position you have selected.
- Attend in-service trainings as needed.
- Review our [Volunteer Handbook](#).
- Questions? Contact Diane Reale at dreale@GoochlandCares.org or (804) 556-0712.



Sample Onboarding Checklist

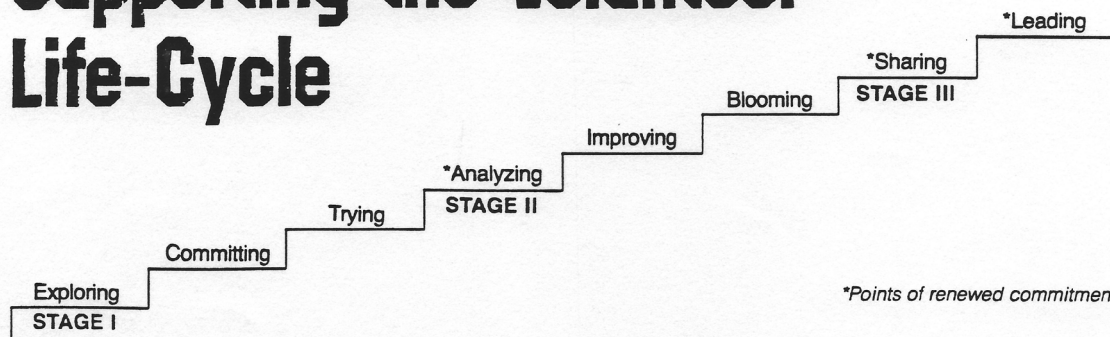
Supervisor First Day Checklist for New Volunteers

- Role Description: Please confirm the role description and expectations for the volunteer/intern
- Name Tag: Please confirm that the volunteer/intern is wearing his/her name tag
- Dress Code: Please discuss your dress code expectations in your program/department
 - Instructions at training: Business Casual
- Belongings: Please let the volunteer/intern know where he/she can securely store his/her belongings while volunteering
- Schedule: Please confirm the volunteer/intern's intended schedule and make sure the volunteer/intern is included in daily staffing charts
- Introductions to Staff: Please introduce the volunteer/intern to staff that he/she will be working with on a regular basis
- Activity Schedule: Please show the volunteer/intern the daily/weekly activity schedule for your program and review what will be happening that day
- Staff Buddy: Please identify one staff person that the volunteer can be assigned to for the first day(s) who can answer questions and make the volunteer/intern feel welcomed and secure
- Introductions to Program Participants: Please identify one individual or a small group of individuals that the volunteer/intern can sit with to engage in an activity
- Reminder: no cell phones permitted in programming areas
- Questions?

Supporting Volunteer Involvement

- ✓ **Supporting the volunteer life cycle**
- ✓ **Volunteer communication plan template**
- ✓ **Volunteer Newsletter Excerpt**
- ✓ **Sample volunteer rights and responsibilities**
- ✓ **Guidance about volunteer discipline & dismissal**
- ✓ **Rethinking recognition: acknowledgement**
- ✓ **Annual plan to thank volunteers and acknowledge impact**

Supporting the Volunteer Life-Cycle



By Paula J. Beugen

Each of us is a unique human being. We enter into most new situations with a touch of enthusiasm and anticipation, hope and fear. This is as true for volunteers who are new in their positions as it is for volunteer administrators. We who cherish the contributions of volunteers work very hard to keep these special people on our team. We celebrate the emergence of experienced, successful volunteers.

Those of us who "have been around" for awhile have an important role to play. Some of us are formally responsible for providing support to volunteers. Others may choose to take on this responsibility. Every person involved is in a position to influence the climate of an organization and the well-being of volunteers.

This article is about helping volunteers grow in their volunteer positions and within their organizations. It is based upon my own observations and experience in working with volunteers for the past ten years.

In order to be supportive, we must be sensitive to each volunteer's feelings and needs at any given time. This is not a simple task and no one can do it perfectly. By thinking about the course of a volunteer's experience as a volunteer life-cycle, we will be in a better position to identify how we can help.

I believe there are three primary stages in the growth of a volunteer: Exploratory (Stage I), Developmental (Stage II) and Mature (Stage III). Usually, there are steps within each stage (see illustration).

Paula Beugen is a consultant on volunteerism to the Minnesota Office on Volunteer Services and other organizations.

I want to emphasize that no two people or situations are exactly alike. Many volunteers will experience some variation to the described stages and steps. However, I suspect that much of what I have to say may feel familiar to many of you—because you have been there.

Stage I: Exploratory

Stage I is when the volunteer is becoming more familiar with your organization and expectations. He/she has made an initial commitment to volunteer, but this commitment has not yet crystallized.

The volunteer is eager to get started—but feels unsure. He/she wants to know as much as possible about the purpose and background of the organization, as well as the specific tasks required to perform. You can help by providing a thorough orientation where questions and comments are encouraged.

At this point, the volunteer will probably have these thoughts:

- "Is this a reputable organization?"
- "Is this a worthwhile way to spend my time?"
- "Can I really make a difference?"
- "Am I competent to do a good job?"
- "Will other people feel that I am the right person to do the job?"
- "Do I belong here?"

This is a critical period. The volunteer feels anxious and may consider backing out. With your encouragement and reassurance, he/she is likely to hang on a little longer.

Communicate with this person now. Point out that most people feel uncertain when they start volunteering.

Once this first hurdle is cleared, the vol-

unteer has made a commitment to give the position a serious try. He/she is very curious about what the experience will be like and what he/she needs to know.

It is time to help the volunteer start to dig in. *General* training, which is not overwhelming, will offer a needed foundation upon which to build even further instruction. Providing opportunities to observe others in a similar position can be extremely beneficial.

The volunteer is ready to try to do the job. The first time is the scariest. Again,

Sue Johnson

When Sue Johnson first started volunteering with the Minnesota Office on Volunteer Services, she never dreamed that three years later she would be coordinating the entire MOVS library. During her first year, she spent most of her time typing. It soon became obvious, however, that she was capable of much more responsibility. Gradually, she was introduced to a range of library tasks.

Today, Sue is in charge of circulation of all MOVS library materials. She distributes books, handles necessary correspondence, monitors overdue notices, prepares documents for the shelves, and delegates tasks to other volunteers.

Over the past few months, Sue has bloomed. She is moving into the sharing step of the mature stage and will be supporting other volunteers as they enter the volunteer life-cycle as MOVS library volunteers.

he/she needs your acceptance. This is another major hurdle to be jumped. One way to help is to offer an opportunity to practice a skill before it is actually applied.

Identify one key person to assist the volunteer as the need arises.

Cheer for the volunteer. Recognize his/her courage and risk-taking for trying a new task and following through on a commitment. Although the volunteer is probably feeling frustrated, knowing that he/she is genuinely needed may be enough for him/her to "stick to it." The volunteer is keenly aware that until now he/she has been receiving more than giving.

As a result of careful instruction, close monitoring, communication and on-going encouragement, the volunteer has done a reasonably good job from the very beginning. He/she is striving for excellence while accepting that imperfection is to be expected at first. Most of all, a valuable volunteer has been retained through several attempts at carrying out an important task.

Hooray for you! *You* have helped a volunteer move through Stage I, the Exploratory Stage.

Stage II: Developmental

In the next stage, the Developmental Stage, the volunteer really experiences a growth spurt. It is an exciting time, and the

Jeffrey Hazlett

Jeffrey Hazlett moved very quickly from the exploratory stage to the developmental stage of the volunteer life-cycle. This past summer, Jeff began volunteering with the Minnesota Office on Volunteer Services. He is a teaching associate with the University of Minnesota Composition Department and came to MOVS to share his interests and skills as well as broaden his work experience.

Jeff's involvement with MOVS has ranged from editing resource materials to reviewing and processing library publications and creating a manual for maintaining the MOVS resource library.

Within just a few weeks, Jeff made a huge commitment. He tried and analyzed a variety of tasks and became familiar with the MOVS library system. Now Jeff is making suggestions to improve library administrative procedures and is working independently to update the library bibliography.

Jeff, too, is blooming!

volunteer is hungry for information and specific techniques.

There are many ways to support a volunteer during this stage. It is a perfect time for specific in-service training. The volunteer wants to know how to do an even better job and is busy analyzing and testing different ideas and approaches. You will want to reinforce accurate or positive behavior. Comment on the volunteer's strengths and show him/her ways to do things effectively. Coach the volunteer.

Feelings of satisfaction from the volunteer position usually begin to emerge now. The volunteer realizes that his/her performance constantly is improving and that he/she is a contributing member of the team. Sessions where peers in like positions get together to exchange ideas and experiences can be particularly valuable and exhilarating during Stage II. The presence of a knowledgeable facilitator or advisor is often worthwhile.

During the latter part of the Developmental Stage, the volunteer is blooming! He/she is starting to assert his/her views and observations. This is healthy. The volunteer wants to apply higher-level skills and his/her dependence is decreasing.

Now is an important time to restate and clarify the goals of the volunteer position. You may want to suggest resources that correspond to the philosophy and approach of the organization. Opportunities to interact with key leaders or staff members will reinforce the values and methods of the organization.

Sometimes the volunteer will feel undervalued or even unappreciated during Stage II. Other people may be too engrossed in their daily activities to notice the volunteer's contributions, or the volunteer may not yet have a complete understanding of the "total picture."

You can increase the volunteer's sense of belonging by communicating frequently, respecting his/her feelings and ideas, noticing progress toward established goals, and perhaps arranging for a social gathering to celebrate the volunteer's recent accomplishments.

Congratulations! Once again you have stood by a volunteer. At the same time, you have helped to assure quality services within your organization. The volunteer chooses to stay, not knowing he/she is on the verge of moving from Stage II to Stage III.

Stage III: Mature

The final stage in the volunteer life-cycle can be the most fulfilling of the three

Barb Winikoff

Barb Winikoff began her career in Minnesota's Robbinsdale School District as a volunteer at her neighborhood school in Golden Valley, Minnesota. I met Barb several years later when she became interested in volunteering to help adults learn English as a second language—which she did very effectively for two years.

Barb wanted to test her skills in new areas. In 1979, she came to me to explore options for her development. We decided that Barb had many skills to offer and that she could grow as a volunteer by working as a volunteer administrative assistant for the Robbinsdale Area Schools Volunteers in Action program.

Barb matured as a volunteer. She built her qualifications through volunteer experience. Subsequently, she was hired to supervise the entire Volunteers in Action operation.

stages. At this point, the volunteer is often giving more than receiving, even though he/she receives a lot!

The mature volunteer is frequently unassuming or even modest. He/she has become comfortable in carrying out responsibilities, intuitively knowing what to do and how to do it. This is an extremely skilled person who often is unaware of the extent of his/her high-level abilities.

Sometimes a mature volunteer unconsciously feels under- or over-involved. A symptom may be an apparent loss of enthusiasm. By reflecting on the situation, you might interpret whether or not the volunteer's skills are being fully utilized.

He/she may be ready for some form of advancement within the organization. On the other hand, the organization may be becoming overly dependent on this single volunteer and, therefore, the volunteer is getting tired. A place to start is to affirm the value of the volunteer's current contributions. Recognize and communicate his/her *specific* qualities, competencies and accomplishments that have been an asset to your organization. Explore whether or not the volunteer is willing to share his/her experience with others or desires a change in responsibilities.

There are two steps in the Mature Stage. The first is the "sharing step" and the second is the "leading step." The latter is the highest step in the entire volunteer life-

LIFE-CYCLE OF A VOLUNTEER

Predominant Factors

Predominant Factors					
Stage I Exploratory	Characteristics Exploring Committing Trying Receiving more than giving	Common Feelings Curious Eager Anxious Frustrated Unsure Overwhelmed	Needs of Volunteer Encouragement Instruction Communication Reassurance Acceptance Recognition	Needs of Organization Quality Control Retention of the volunteer	Possible Action Areas Orientation General training Opportunities to observe others Regular communication Opportunities to practice ideas Identification of one key person who can give help
Stage II Developmental	Characteristics Growing Testing and analyzing Blooming Asserting views and observations Decreasing dependence on others Contributing Recommitting	Common Feelings Excited Confident Wanting to know how to do a better job Satisfied Undervalued Wanting to learn new or higher level skills Unappreciated	Needs of Volunteer Reinforcement Support resources Communication Clarification Sense of belonging Recognition	Needs of Organization Quality control Retention of the volunteer Progress towards established goals	Possible Action Areas Frequent communication Peer support mechanism In-service training Social gatherings
Stage III Mature	Characteristics Advising Leading Mentoring Unassuming Sharing Modest Giving more than receiving Recommitting	Common Feelings Skillful Comfortable Under or over involved Modest Unaware of the extent of his/her high-level skills	Needs of Volunteer Affirmation of value Opportunities for advancement Recognition	Needs of Organization Retention of the volunteer Utilization of skills and experience of the volunteer Development of leadership	Possible Action Areas Leadership training External training Teaching roles Advising roles Advocacy roles Career paths Public visibility

Note: Factors will vary according to the individual and organization.

cycle. Not everyone aspires to reach the "leading step"; some leave the volunteer community before reaching the "sharing step."

The "sharing step" can be characterized as a time for exchanging ideas and experience with others (often in addition to continuing previous responsibilities). For example, the volunteer may be willing to offer one-to-one support to another volunteer on an informal basis. Or, he/she might participate in a support session with volunteers in the Developmental Stage to offer insights.

The volunteer who is in the "leading step" would take this even further. Per-

haps he/she would be a mentor to another volunteer (provide long-term emotional support and practical advice that would help another volunteer achieve desired goals). Or serve as a consultant to a support group upon request. Or become the chairperson or president of a key group.

The mature volunteer is especially precious. He/she is the leader, advisor or mentor within your organization—the one you rush to consult when a problem or challenge arises.

Because you have continued to care, a volunteer has blossomed and matured. Your final major task is to encourage your organization to draw upon the skills and

experience of the volunteer whom you have supported. Stress the value of leadership development experiences such as participation in training sessions sponsored by other organizations; opportunities to hold teaching, advising or advocacy positions; and new responsibilities that will propel the volunteer along a career path. Create situations that stimulate public visibility for this steadfast volunteer who can serve as a role model for others to follow.

In the final analysis, *your success* in helping one volunteer to grow from strength to strength will be passed on, and on, and on....

Volunteer Communication Plan Template (*with examples*)

WHEN	WHAT	HOW	WHO	Notes
EXAMPLE: Early January	New Year News: <ul style="list-style-type: none"> ▪ Message from Exec. Dir. Recognizing vol. efforts during holidays and current org. priorities. ▪ MLK Day project ▪ Reminders: tracking your hours; flu shots required onsite; join new Facebook group. ▪ Spotlight: Vol. Finance intern 	Constant Contact Email to all active volunteers	K.C. provides content to Comm. staff by Jan. 5	Work w/ E.D. re message. Is it possible to include photos?
February/July/November	E-newsletter (and print newsletter for those without email) including <ul style="list-style-type: none"> • Volunteer Spotlight • Impact • Volunteer Opportunities 	Constant Contact (and snail mail)	Development Assistant responsible for newsletter. Intern interviews volunteer and writes Spotlight.	When choosing volunteer for Spotlight, include staff input.

VOLUNTEER-NEWSLETTER Excerpt: *This large organization puts out a very comprehensive monthly e-update for all volunteers. To see complete newsletters & get ideas for content you can use, visit www.SOAR365.org Click on the VOLUNTEER page and then click on the box VOLUNTEER NEWS.*

August 2020



SOAR365 Volunteer News & Updates

When you volunteer with SOAR365, you support our mission to create life-fulfilling opportunities for people with disabilities! Check out our opportunities below and resolve to make a difference in the lives of the people we serve!

**Become a
Volunteer!**

In This Issue

1. Five Great Reasons to Volunteer with SOAR365
2. **Fall Events, Internships, and Beautification Opportunities**
3. Staff Spotlight: Dan Blair, RN
4. Volunteer Spotlight: Virtual Administrative Assistants
5. **Take Your Volunteer Leadership Skills to New Heights with NGC!**
6. Shout-Out To Volunteer Donors + **DIY Opportunities**
7. August Volunteer Learning Corner
8. **Upcoming Volunteer Orientations** & Resources

To find out more about any of the opportunities listed below, please send an email to alison.jones-nassar@soar365.org!

Five Great Reasons to Volunteer With SOAR365

There are so many good reasons to volunteer. Decades of consistent research demonstrate the clear benefits, not just for the volunteers themselves, but also for organizations, service recipients, and entire communities. **But how do you determine the BEST place to donate your time & skills?**



1. Does the organization care about your safety and well-being? According to a recent survey, more than 90% of volunteers who responded trust SOAR365 to implement the necessary safety protocols and plan to return as soon as they are permitted. **You can feel confident that your safety**

SAMPLE: VOLUNTEER RIGHTS AND RESPONSIBILITIES

Volunteers have the following rights:

- To be recognized for their efforts
- To be given opportunity for a variety of experiences
- To be given sound guidance and direction
- To be heard and have a part in planning procedures, if appropriate.
- To be provided orientation, training, support supervision and feedback.
- To be trusted and respected by staff, volunteers, and clients.
- To be valued as a person who can make unique contributions.
- To have a clear understanding of the job including duties, responsibilities, support person, structure, and time commitment.
- To have risks explained.
- To know as much as possible about the organization and to be kept informed of policy changes.
- To have proper working conditions.
- To receive prompt response to questions and concerns.

Volunteers have the following responsibilities:

- To respect and maintain strict client confidentiality at all times.
- To treat clients, volunteers, and staff with respect, courtesy, and compassion.
- To understand that the resources designated for clients are to be used for clients only.
- To be punctual and notify the Program Manager of absences as much in advance as possible.
- To participate in any training required by the organization.
- To be open and honest regarding intent, goals, and skills.
- To accept only realistic assignments and have a clear understanding of the job.
- To carry out duties promptly and reliably
- To accept guidance and direction from the staff and supervisory volunteers.
- To discuss satisfactions, dissatisfactions, and suggestions for changing volunteer assignments.
- To recognize the function of the paid staff, maintain a smooth working relationship with them and stay within the bounds of volunteer responsibility

Source: Volunteer Handbook (Goochland CARES)

DISCIPLINE AND DISMISSAL: POLICY AND PROCEDURE

The extent of complexity and responsibility of the work we now assign to volunteers demands that organizations have clear and comprehensive policies and procedures governing volunteer involvement. Nowhere is this more important than for the topics of volunteer discipline and dismissal.

Your Policy Might Cover The Following

- ⇒ establish agency's right to terminate volunteer's involvement
- ⇒ this right is based on agency mission and service to clients as highest value
- ⇒ cite sample grounds for dismissal
- ⇒ cite preferred route of progressive discipline where time and circumstances allow
- ⇒ note agency's commitment to investigate and document all performance concerns and incidents which may serve as grounds for dismissal
- ⇒ note agency's commitment to always hear volunteer's side
- ⇒ note who has authority to fire
- ⇒ outline who needs to be informed either of intent to dismiss (in advance), for information or approval, or who needs to be notified of the act after it has taken place
- ⇒ formal notice of termination will be presented in writing to volunteer upon termination, or through mail within specified time period
- ⇒ outline appeal process if any

YOUR PROCEDURE MIGHT INCLUDE THE FOLLOWING

- ⇒ who has authority to dismiss?
- ⇒ face-to-face meeting
- ⇒ witness present?
- ⇒ protocol for personal safety protection
 - security in vicinity
 - clear other personnel from area
 - security escort from premises
 - notification of authorities if transgression has been violent, criminal, abusive
- ⇒ recovery of agency property (keys, computer disks, manuals, identification, uniform)
- ⇒ notification of relevant agency personnel and clients, and public and other agencies where necessary

A CHECKLIST ON DISCIPLINE AND DISMISSAL

Complete the following checklist in the event that you consider disciplining or dismissing a volunteer. For each question in the left column, check a *yes* or *no* in the right column. If you check *no*, then you have additional action to take before dismissal is warranted or can proceed.

QUESTIONS	ANSWERS	
Have You:	Yes ()	No ()
1. Conducted an interview with the employee as a first step in the disciplinary process?	()	()
2. Made sure in your interview with the employee that you		
a) informed the employee of the circumstances leading up to the interview?	()	()
b) indicated specific examples of problem behaviours?	()	()
c) gave the employee a chance to respond to the circumstances and examples you pointed out?	()	()
3. Provided specific, concrete recommendations for improvement?	()	()
4. Prepared a memo documenting the interview and outlining the steps agreed to by the employee to bring about a change in behaviour?	()	()
5. Agreed on a date for a future discussion about the problem behaviour with the employee?	()	()
6. Documented the date for the agreed on discussion and allowed employee comments (if any)?	()	()
7. Signed the memo?	()	()
8. Had the employee sign the memo?	()	()
9. Retained a copy of the memo for your files?	()	()
10. Given the employee a copy if he or she requests one?	()	()
11. Sent a copy of the memo to your supervisor and/or the Personnel Department?	()	()
12. Prepared a written warning(s) as a second step in the disciplinary process, assuming performance or behaviour does not improve?	()	()
13. Contacted your supervisor and/or the Personnel Department if termination is contemplated?	()	()



Rethinking Recognition: Acknowledgment

What makes acknowledgment different from recognition? Acknowledgment is a *mutual* expression of appreciation and gratitude. When acknowledgment is innovative and personalized, it can motivate and inspire both staff and volunteers.

- Opportunities to **share the impact of their work**:
 - Have the volunteer make a presentation to the board
 - Invite the volunteer to write an article on the project for a publication
 - Ask the volunteer to represent you at meetings
 - Offer to write a letter of recommendation or commendation to the volunteer's workplace or school
- Opportunities to **gain or develop new skills**:
 - Offer to send the volunteer to a conference
 - Provide the volunteer with training or mentorship on new technology, practices, or research
 - Send the volunteer to a lecture or program by an expert in a field related to his/her volunteer work
- **Small but meaningful tokens** of appreciation:
 - Donate a book to a library in the volunteer's name
 - Order and distribute cute gifts such as...
 - Miniature flashlight with a note, "Thanks to a bright light"
 - A package of tea with a note, "Since you became a volunteer things are really brewing around here!"
 - A wine glass with candy with a note, "A toast to a job well done!"
 - Create a survival kit and distribute before an event, including items that will help the volunteers thrive even under stressful conditions (e.g., an energy bar, a water bottle, a throat lozenge, etc.)
- **Fun and memorable ways** to show appreciation:
 - Create humorous awards such as...
 - Best attendance in meetings
 - Most outrageous ideas
 - Most inspiring pep talks
 - Create a photo album or digital slide show with pictures of the volunteer activity, program, or event

Brainstorm Additional Ideas for Volunteer Recognition below.

TEMPLATE: Annual Plan to Thank Volunteers and Acknowledge Impact *(with examples)*

WHEN	WHAT	HOW	WHO	Notes
January	“JanYOUary – Centers Around YOU!” Message with treats.	Message on white board with specific accomplishments each week.	Volunteer Coordinator with input from program staff.	
Volunteer’s First 10 hours	“Thank you for joining the team. You have donated 10 hours	Handwritten note sent to new volunteers at the 10- hour milestone with mention of impact of program.	Volunteer Coordinator	Ongoing
Post Event	“YOU made it happen! Our Board appreciates all your hard work on the _____ event.” Board members send email “thank you” or make thank you phone calls to event volunteer leaders or planning team members.	Assign a few volunteers to each Board member. Provide contact info for each volunteer, plus a suggested script. Include mention of a few specific results/successes of the event that met the goals.	Board members	

Documenting Volunteer Activity & Impact

- ✓ **Sample volunteer satisfaction survey**
- ✓ **Individual volunteer self-assessment**
- ✓ **Sample volunteer exit survey**
- ✓ **Sample impact statement**
- ✓ **Annual impact reports (2 examples)**
- ✓ **Ways to calculate the value of volunteer time**
- ✓ **Examples of volunteer value indicators**

Sample Volunteer Satisfaction Survey (2 pages)



Volunteer Survey 2019

Please help us continue to improve the volunteer experience here at FHCC – and recruit more dedicated supporters like you!

This brief survey takes 5 minutes or less to complete **OR** you can complete the online version at <https://www.surveymonkey.com/r/SV3N58H>

All individual responses will remain confidential, seen only by the consultant working with FHCC. She will then prepare a summary of feedback to share with the Volunteer Council and staff to inform future action and program improvements.

Please respond honestly and thoughtfully. Your voice matters!

* * * * *

1. How long have you been a volunteer with Historic Christ Church?

- | | |
|---|--|
| <input type="checkbox"/> Less than 1 year | <input type="checkbox"/> 7 to 10 years |
| <input type="checkbox"/> 1 to 3 years | <input type="checkbox"/> 11-20 years |
| <input type="checkbox"/> 3 to 5 years | <input type="checkbox"/> 21-30 years |
| <input type="checkbox"/> 5 to 7 years | <input type="checkbox"/> Over 30 years |

2. How have you been involved? (check all that apply)

- | | |
|---|--|
| <input type="checkbox"/> Administrative Support | <input type="checkbox"/> Hospitality / Events |
| <input type="checkbox"/> Costumes | <input type="checkbox"/> Marketing / Publicity |
| <input type="checkbox"/> Docent | <input type="checkbox"/> Receptionist |
| <input type="checkbox"/> Education | <input type="checkbox"/> Recognition |
| <input type="checkbox"/> Flowers | <input type="checkbox"/> Research |
| <input type="checkbox"/> Gift Shop | <input type="checkbox"/> School Programs |
| <input type="checkbox"/> Group Tours | <input type="checkbox"/> Volunteer Newsletter |
| <input type="checkbox"/> Herb Garden | <input type="checkbox"/> Volunteer Council |
| <input type="checkbox"/> Historian | <input type="checkbox"/> Board of Directors |

3. Overall, how satisfied were you with your 2018 volunteer experience?

- Very Satisfied
- Somewhat Satisfied
- Not Sure
- Somewhat Dissatisfied
- Very Dissatisfied

4. Why did you initially decide to volunteer with Historic Christ Church? (check all that apply)

- A friend or family member asked me to help
- I love history and historic preservation
- I was looking for something worthwhile to do with my time
- I wanted to use my skills and knowledge to help a local organization
- I was new to the area and wanted to get to know other people

5. What do you enjoy most about volunteering with Historic Christ Church? (check one)

- Interacting with visitors
 - Interacting with staff
 - The tasks/work that I do
 - Interacting with other volunteers
 - Other: please explain
-

6. How would you rate the preparation and/or training you received for the job(s) you volunteered to do?

- Good – I got what I needed
- OK – somewhat helpful
- Poor – I wanted more

7. Do you feel appreciated and supported by the organization?

- Yes – all or most of the time
- Sometimes – occasionally
- No – very rarely

8. How did you first learn about volunteer opportunities with Historic Christ Church? (check all that apply)

- Word of mouth. A friend or family member spoke with me about it.
- Website or internet search
- I attended an event at Historic Christ Church
- I first visited the site and was given information
- Other: please explain _____

9. Feel free to provide additional comments or suggestions:

Thank you for your time and feedback.



Handout 5

Volunteer Self-Assessment Form

1. Do you feel you are reaching the expectations listed in your position description (goal setting, etc.)?
If not, share your reasons for the gap.
2. Was the estimated time to accomplish your volunteer work realistic? Comment:
3. Did the organization/supervisor provide adequate orientation, training, supervision and resources for you to accomplish your position? Comment and offer suggestions for improvement:
4. What have been your greatest satisfactions in your work here?
5. What have been your greatest disappointments in your work here?
6. Were other volunteers and paid staff receptive and appreciative of your volunteer work?
Comment:
7. What were your areas of growth in your volunteer position?
8. Overall I would rank my performance as:
 Superior, exceeding expectations
 Excellent, met expectations
 Needing improvement, did not meet expectations

Comments to explain above answer:
9. What type of assignment, skill development, and time commitment do you desire for next year or the time period under discussion (same position, new challenges, departure)?
10. Other comments, suggestions, etc.

Sample Volunteer Exit Survey

Figure 3: Extracts from an Exit Questionnaire from Trilogy, Inc.

Date: _____

Name (optional): _____

I have been involved with the volunteer program for:

- 3 to 6 months 6 mos. to 1 year 1 - 2 years Over 2 years

I have been matched as a:

- Reading tutor Special projects GED tutor Mentor
 Math tutor Other (specify) Computing tutor

Please answer the following questions as either:

Strongly Agree (SA), Agree (A), Disagree (D), Strongly Disagree (SD), or Not Applicable (N/A).

(circle one)

- | | | | | | |
|----|---|---|----|-----|---|
| SA | A | D | SD | N/A | 1. My initial contact with the Volunteer Coordinator was helpful and informative. |
| SA | A | D | SD | N/A | 2. Information about the program was presented in a clear manner. |
| SA | A | D | SD | N/A | 3. Information about the program was presented in a concise manner. |
| SA | A | D | SD | N/A | 4. I was adequately trained and informed prior to starting my volunteer experience. |
| SA | A | D | SD | N/A | 5. The Volunteer Coordinator made an appropriate participant match for me. |
| SA | A | D | SD | N/A | 6. The Volunteer Coordinator provided adequate support and guidance. |
| SA | A | D | SD | N/A | 7. I felt comfortable bringing comments and suggestions to the Volunteer Coordinator. |
| SA | A | D | SD | N/A | 8. I felt comfortable bringing my concerns and complaints to the Volunteer Coordinator. |
| SA | A | D | SD | N/A | 9. The Volunteer Coordinator was available when I needed assistance. |
| SA | A | D | SD | N/A | 10. I feel I have benefited from my experience as a volunteer. |
| SA | A | D | SD | N/A | 11. The amount of time I volunteered was adequate to meet my needs. |
| SA | A | D | SD | N/A | 12. I felt satisfied in my role as volunteer. |
| SA | A | D | SD | N/A | 13. I feel I have made an impact in the life of my participant(s). |

If you could change three things about Trilogy's volunteer program, what would you change?

1st: _____

2nd: _____

3rd: _____

What are the three things you liked most about being a volunteer at Trilogy?

1st: _____

2nd: _____

3rd: _____

Sample Impact Statement

SOAR365 Volunteers Made a Difference in 2020!

Despite the incredible challenges of 2020, volunteers and interns continued to serve SOAR365 in ways that mattered! Because of our steadfast commitment to COVID safety protocols that prioritized the well-being of all volunteers and interns, nearly 400 supporters confidently stepped up to help us address operational priorities across the organization! **Here are just a few of their accomplishments:**

- **18 [administrative support interns and volunteers](#)** completed more than 1500 hours of (mostly virtual) service, assisting with everything from lesson plans, event logistics and promotion, donor research, flyer & brochure design, and targeted volunteer recruitment;
- **82 [fieldwork students](#)** completing OTA and Physician Assistant certificates developed recorded patient education modules on topics ranging from physical fitness, dental hygiene, relaxation techniques, healthy nutrition, and fire safety for use in our Adult and Children/Youth Day Programs;
- **40 [beautification volunteers](#)** (participating within groups and as individuals) donated 155 hours to help with our Fall Spruce-Up Campaign, [clearing trails](#), [weeding](#), [mulching](#), [painting](#), [installing raised garden boxes](#), and [building](#) benches, compost bins, bat boxes, and mini pantries;
- **18 [event support volunteers](#)** completed 38 hours in steady rain to support our Honk & Cheer celebration;
- **48 [volunteers](#)** donated 117.5 hours to [assemble and distribute 550 enrichment kits](#) to adults and kids served by SOAR365 programs;
- **27 [volunteers](#)** donated more than 75 hours to help with our December [Cleaning Campaigns](#), organizing 70+ supply cabinets, cleaning out refrigerators, and discarding 10+ barrels of trash.

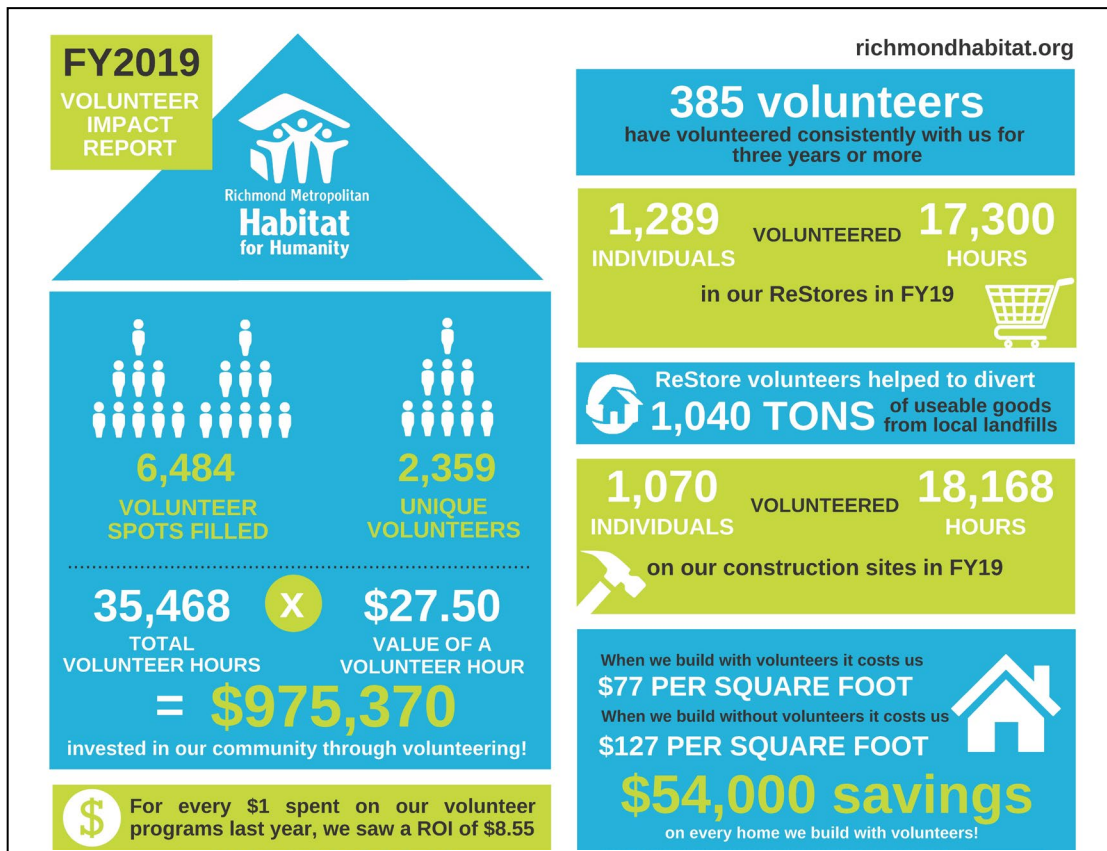
Annual Impact Reports (2 examples)

YOU were here.

Volunteers are absolutely critical to GoochlandCares' ability to deliver services to neighbors in need. You donate your time and skills every day of the week, and work in every one of our 12 programs. GoochlandCares is extremely proud to be recognized as a Service Enterprise organization for demonstrating excellence in volunteer management. Your support makes fulfilling our mission possible.

In 2019,
554 individual volunteers
plus 67 volunteer teams
donated 26,033 hours
valued at \$814,157.

Collecting food and clothing | Sorting and stocking donations | Answering phones
 Welcoming clients and visitors | Preparing taxes | Planning events | Interviewing clients
 Scheduling appointments | Performing dental cleanings | Fixing steps
 Making plumbing repairs | Picking up recycling | And so much more!



Ways to Calculate Value of Volunteer Time

Wage Replacement Calculation

- Assigns an hourly dollar value to time contributed by volunteers
- Variety of options for selecting that value:
 - Independent Sector (current national rate: \$27.20)
<https://independentsector.org/value-of-volunteer-time/>
 - Market value per job, available at U.S. Bureau of Labor Statistics
<https://www.bls.gov/bls/blswage.htm>

The ADVANTAGES of this method are:

- Tells us about volunteer activity and the size of the volunteer corps.
- It can be helpful to communicate that volunteer time has a financial value
- Can be useful for including volunteer time as in-kind match or on financial statements.
- May appeal to those who appreciate economic value/quantification of volunteer time.

There is certainly a time and a place for these indicators BUT not every time and every place.

Because there are some DISADVANTAGES as well:

- Omits what happens as a result of volunteer time. They don't tell us anything about what all those hours of service accomplished.
- Obscures what else may be meaningful and relevant to track.
- Keep in mind that the Independent Sector average hourly rate is higher than many typical nonprofit salaries, which may lead to staff resentment or lack of credibility.

****When we use ONLY these metrics, we define success as simply growing volunteer numbers.** Using number of volunteers and number of hours of service leads to the simplistic assumption that volume = impact. It shifts volunteers from a means to support a mission to an end in and of itself —it becomes a volunteer program, not an asset that supports the entire organizational mission. ALSO: Keep in mind that although it is still the predominant measurement expected by many funders and boards, it is NOT the only measure they are interested in.

Cost Effectiveness Analysis

- Compares the cost of doing something with volunteers vs. without volunteers
- Most useful for projects or programs
- Demonstrates financial efficiency, and in some case, “cost savings”
- Can be a helpful planning tool

This method is often useful when considering the value of delivering a specific program or accomplishing a complex task. Perhaps your organization has been conducting a home visitation program utilizing volunteers. Some are now questioning whether to use staff for this instead. To illustrate the value of utilizing volunteer resources in this way, you could compare the total cost of delivering the program with volunteers and with staff. Some of the costs – such as supplies, insurance, -- may be the same in both cases, but the bottom line will look quite different. This information may not be the only criteria for deciding on the best way to deliver the program, but it will provide a helpful clear picture of financial efficiency.

Return on Volunteer Investment (ROVI)

No doubt you have heard many references to ROI, something on which profit businesses have been focused for decades. Similarly, nonprofit organizations (especially senior leaders and Board members) can examine how investments in their own operations, such as staff development, technology or volunteer engagement, can increase efficiencies, effectiveness and organizational capacity.

The ROVI process was developed a few years ago based on several years of national research. The research consistently indicates that every \$1 invested in highly effective volunteer engagement practices can lead to a \$3 to \$6 return on that investment. As volunteers are more effectively integrated into your operations, they allow paid staff to focus their efforts on activities they are uniquely qualified to perform in addition to creating other organizational efficiencies. In addition, understanding the return on investment your volunteers generate could help build support from Board members and external funders.

There is a simple Excel worksheet to help you calculate your organization's ROVI. Email Katie Campbell if you'd like a copy, ktcampbell49@gmail.com. Consider asking a Board member (former or current) to work on this for you!

Examples of Volunteer Value Indicators

Compiled by Sue Carter Kahl and Katie Campbell, 2019

Return on Volunteer Investment (ROVI) - “For every dollar our organization invests in having volunteers involved, we receive X dollars of value toward advancing our strategic priorities and mission.”

Volunteer "Conversion" Rate – What percentage of people who contact you about volunteering begin active volunteer service?

Annual Retention Rate - What percentage of currently active volunteers were active 12 months ago?

Service Event Participation Rate - Average percentage of people who sign up to help at events/projects actually show up

Project Completion Rate - What percentage of volunteers who begin a short-term project complete the project successfully?

Volunteer / Donor Rate – What percentage of current volunteers also donate money?

Service and Client Measures

- Number of clients or participants served by volunteers
- Number of services provided by volunteers (rides given, meals delivered, youth mentored)
- Amount of change achieved by volunteers (i.e., number of seniors able to live independently)
- Percent of need met by volunteers (number of hours filled/number of hours needed)

Organization and Department Measures

- Number and/or type of organizational goals met through volunteer support
- Range of roles performed by volunteers
- Number of volunteers or volunteer hours by program or department
- Program or process improvement suggestions made by volunteers
- Extent to which volunteers reflect the community served (language, race/ethnicity, age, gender)

Human Resource Measures

- Ratio of time invested in volunteer management to volunteer time contributed
- Number of volunteers supervising or training other volunteers or staff
- Amount of staff time freed up by volunteers
- Volunteer ratios (volunteers to paid staff, volunteers to volunteer administrators)
- Volunteer time converted to full-time equivalents (FTE) (i.e., volunteer who works 10 hours per week all year would be .25 FTE)

Satisfaction Measures

- Volunteer satisfaction rate
- Paid staff's level of satisfaction with volunteers
- Clients' level of satisfaction with volunteers

Financial Measures

- Amount of money/in-kind gifts raised or donated by volunteers
- Extension of budget achieved by engaging volunteers (additional services provided because of volunteers)

Volunteer Engagement Resources

Volunteer Match: www.volunteermatch.org

The largest online database of volunteer opportunities, and much more. Free monthly webinars on volunteer management topics, free e-newsletter, research reports. Sign up as a nonprofit member to gain access.

Association for Leaders of Volunteer Engagement (ALIVE): www.volunteeralive.org

National professional association for leaders of volunteer engagement in all types of settings.. Modest membership dues provides access to virtual training, annual hybrid conference, and other resources.

Points of Light: www.pointsoflight.org

International organization supporting volunteer engagement. Information related to building volunteer leadership; innovative civic engagement strategies; corporate volunteerism. Special section for nonprofits. Annual promotion of Volunteer Week. Annual conference.

Council for Certification in Volunteer Administration: www.cvacert.org

Offers an international credential for leaders and managers of volunteers.

Catchafire www.catchafire.org/about/

Platform to help nonprofits recruit skilled volunteers to assist with a wide range of projects – marketing, fundraising, communication, graphic design, technology, etc.

Volunteer Management: Mobilizing all the Resources of the Community, by McCurley & Lynch. Excellent book covering all the basics. Very practical with lots of sample forms, checklists, etc. https://www.energizeinc.com/store/volunteer_management_mobilizing_all_resources_community

Volunteer Engagement 2.0 Ideas and Insights Changing the World (2015)

Short chapters by numerous authors focus on current trends. Available on Amazon.

Transforming disruption to impact: Rethinking Volunteer Engagement for a Rapidly Changing World (2022) Multiple authors discuss implications of recent national trends.

Available on Amazon.

Software for Tracking Volunteer Data (not a complete list)

Volgistics Better Impact Galaxy Digital Apricot Volunteer Local

REFLECTION: IDEAS FOR FUTURE ACTION

Thinking about what you've heard here today, what are 2-3 specific ideas you'd like to explore further or implement in your organization?

NOTE: Main Street Mobilizers have a special assignment

