

VOLUNTEER MANAGEMENT COMPONENTS



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ENGAGE VOLUNTEERS EFFECTIVELY

What are some characteristics of an agency which engages volunteers effectively? The management:

- **Lays the foundation through mission and vision**

The volunteers are seen as valuable human resources whose efforts directly contribute to the achievement of the organization's mission; a mission clearly articulated, widely shared and openly discussed.

- **Combines inspiring leadership with effective management**

There is a clear focal point of leadership, but all levels of management (policy making, executive and middle management) work in concert to encourage and facilitate volunteer involvement.

- **Builds understanding and collaboration**

There is a conscious effort to reduce boundaries and increase the teamwork between paid and volunteer staff. Accomplishments of volunteers and of staff are equally shared and celebrated.

- **Learns, grows, and changes**

There is an openness to the possibilities for change and an eagerness to improve performance and better meet the points outlined in the mission statement. The value of involving volunteers from all segments of the community is understood and appreciated.

Avoid Micro-Managing – Volunteers need to have clear expectations in their job descriptions to allow them to perform their roles efficiently and effectively without a staff person to stand over their shoulder while they complete their tasks. No one enjoys being micro-managed. [Avoiding this will aid in retention.](#)

ENGAGE VOLUNTEERS EFFECTIVELY

Risk Management

Due diligence is necessary to protect you and your organization. Job descriptions, safety briefings, and supervision are components of Volunteer Management.

- **Create a position description.** (See Appendix for template.) When taking requests for volunteers from another agency, or formulating one of your own, be clear about what skills and abilities are required, to ensure that appropriate volunteers are placed.
- **Provide safety training, and keep records.** Make sure volunteers understand basic safety procedures and have acknowledged that they received this training. This can help protect the organization in the event that something happens.
- **Interview potential volunteers.** Interviews are not only great to make a bond with and place a volunteer, they also allow you to verify and clarify the information submitted on intake forms. Interviews give volunteers an opening to ask questions, clarify responsibilities and express any concerns.
- **If your agency requires background checks, make sure that the fees are written into your budget.** If your agency is placing the volunteer with a different organization, make sure they know that the accepting agency is responsible for this procedure.
- **Be cautious when placing volunteers with vulnerable populations** (i.e., children or the elderly). Check and abide by the policies of schools and other organizations your volunteers will serve. Make sure your volunteers know the importance of key issues, such as confidentiality. Some agencies will require confidentiality agreements and background checks.
- **Volunteers' physical health and abilities should be factored into volunteer assignments.** Provide a wide array of volunteer roles to potential volunteers. Use common sense in placement: some volunteer roles are more strenuous or risky than others.
- **Include a Release of Liability for in the volunteer application.** Make sure volunteers understand the risks they may encounter in a disaster service (for example) assignment by including a Release of Liability (see the Appendix) directly on the volunteer application and reviewing it with potential volunteers during the interview.

IDENTIFY THE FEATURES AND BENEFITS

While often technical, a volunteer position description should include any marketable skills, networking or other benefits you can identify.

Will the volunteer meet the mayor? Develop their public speaking and presentation skills? Gain technical knowledge about painting or building a house? Become certified in some form of disaster mitigation or management? Interact with potential employers? Be featured in national media? What about the benefits their service will have for your agency, or community at-large?

Clarify the expectations.

When designing volunteer position descriptions, clearly specifying roles, expectations, responsibilities and how each position fits in with the overall goal or strategy will reduce misunderstandings for you and your volunteers. Before a project begins, you can get a good picture about capacity by considering how all the pieces (job descriptions) fit together, identify gaps, and rewrite accordingly.

However, a handy rule is to **define what is important; ignore what is not**. If a volunteer is coming to track inventory in the back of a donated food warehouse, is maintaining a “professional appearance” really necessary? Jeans and a T-shirt would probably not only be more appropriate, but more a comfortable way for the volunteer to give of their weekend. On the flip side, if your volunteer will be a media representative for your agency, doing interviews on TV and/or in print, it is vital that you communicate your expectations about dress code, tone, confidentiality, etc. from the get-go.

Getting too technical or unnecessarily strict can make a volunteer feel like their involvement in the project is just another shift at work. Try to avoid this! Your volunteer should feel good about the work they do with your agency.

Be clear in your expectations, and ALWAYS be grateful for the extra, free help!

General points to consider:

Every position description will look different, reflecting the styles and expectations of your agency and taking into account those of your target volunteers. Many agencies do not formulate formal positions, instead casually sending a blurb to an already vetted volunteer through email, or discussing a need that a certain volunteer could meet, over lunch with said volunteer. You do not need to overly formalize your process and procedures in order to get things accomplished for your community, but you do need to communicate what will be expected of the potential volunteer in some way. Experiment with what works for you and your volunteers, but strive for consistency.

Review the position description to determine if it:

- ❑ meets the organization's priority needs, goals and mission
- ❑ ensures the inclusion volunteers with special needs
- ❑ identifies the features and benefits of the role
- ❑ conveys a powerful message of community impact

Consider when designing volunteer roles:

- ❑ safety, risk management and liability issues
- ❑ confirming that volunteers are available to do the task
- ❑ the amount of travel, commitment or training required for volunteers to perform the task is reasonable

Some possible elements to include in volunteer position descriptions:

Position title	Reports/responsible to
Overview of position	Specific tasks
Time required	Qualifications
Physical/age requirements	Skills/education required
Training required	Benefits to the Volunteers
Dates and planning	Dress code
Accessibility of location	Special instructions

CONNECTION TO ORGANIZATION’S GOALS & MISSION

Does this volunteer job description convey the appropriate message?

Often, instead of the full vision or mission, a purpose statement is included at the top of a position description, helping the volunteer connect to the overall goal of their work. A purpose statement describes how a project or program contributes to the achievement of the organization’s mission. (See Appendix for additional example and [Position Description Template](#).)

Example 1: Advisory Board Member

Purpose: To promote school age volunteerism in _____County

Program description: To further the mission of _____, the Advisory Board is comprised of an independent body of 6-10 youth and 4 adults, who provide advice, vision, support, expertise, and direction to grow and promote _____’s youth volunteer initiatives.

Commitment: Meetings are held the first Tuesday of each month, from 6-7:30PM at the _____ Center. Decisions cannot be made without quorum, however if a schedule conflict arises, votes may be given over the phone or through email.

Job Description: Adult Advisor

The 4 Adult Advisors:

1. Provide leadership and guidance to Advisory Board.
2. Develop leadership skills of youth on board.
3. Help board develop policies and procedures as needed.
4. Communicate, on a regular basis, with the board and staff of _____.
5. Inform _____ of any concerns relevant to the success of the school age volunteer program.

Skills preferred: Ability to model leadership qualities, desire to develop youth leaders, ability to work on a team and interest in helping kids connect to their community.

Benefits: An Adult Advisor has the opportunity to formulate and influence local policy and network with community decision makers. Mileage is reimbursed for meetings, and travel and lodging expenses are covered for all four Adult Advisors’ optional participation in the yearly volunteer appreciation retreat.

DEFINING & COMMUNICATING CLEAR EXPECTATIONS

Volunteers need clarity about:

- Significant agency policies, procedures, and operations that affect them or that they affect.
- Their responsibilities and functions toward the agency and its clients.
- The agency's responsibilities toward them.
- Any risks associated with the project or program.

Supervising volunteers:

- Define and communicate clear expectations
- Guide and support volunteers
- Ensure that volunteers feel rewarded and recognized
- Give volunteers the **instructions, direction, feedback, corrections, information** and **freedom** they need to perform their functions well
- Take care of the person, not the task
- Provide guidance in the way that works for the volunteer
- Support, rather than control, the volunteer's effort

NEEDS ASSESSMENT AND EVALUATION

Why should volunteer supervisors conduct needs assessments?

While sometimes cumbersome to collect, track, and maintain; data gathered on your volunteers' work and experiences will serve your agency, partners, clients and community at-large when it comes time to publicize achievements in quantitative terms, change your policies, or pursue new funding sources.

When developing the funding sources for your program, you naturally think about potential outcomes and develop a tracking process so you can prove that you are meeting your targets to funders and stakeholders. However, as a volunteer manager, it is also important to evaluate your volunteers' connection to projects, to your organization and overall satisfaction with their experience. One form of volunteer evaluation is a "needs assessment." Needs assessments are evaluations of the changing needs of the agency, the community and the volunteers.

Why is it important to assess the needs of the volunteer program?

- Create new roles for volunteers
- See where more volunteers are needed
- Determine volunteer interest
- Find out where volunteers are no longer needed
- Find ways to volunteer to make staff more effective
- Buy-in for volunteer programs
- Inclusion of your corporate or community partners

Popular methods of conducting needs assessments

Focus groups
Email/web surveys
Interviews
Mail surveys
Telephone surveys
Pre and Post tests

NEEDS ASSESSMENT AND EVALUATION

Evaluation of your program

By collecting feedback from both the volunteers and supervisors, issues can be identified and obstacles overcome. Establishing an open line of communication early in the volunteer relationship makes evaluations more helpful and natural.

Agencies may want to consider holding bi-annual evaluations where volunteers can speak openly with one another and agency staff. There are many options, ranging from informal emails, to very formal university developed surveys. For most managers, evaluations are written, conducted in one-on-one interviews, or handled in a group forum/meeting.

Volunteers may be initially intimidated or annoyed by the idea of an evaluation. Reassure them that evaluations give volunteers a chance to address issues and problems they may be facing in an open and receptive environment, and help you develop better programs and pursue new goals, volunteers and funding; that it is a task worth doing.

The three basic reasons for conducting volunteer evaluations are to

- help the volunteer work closer to their potential,
- help the organization better involve volunteers, and
- give volunteers the opportunity to identify new needs or solutions.

Failing to evaluate a volunteer sends a clear message that you don't care about the quality of the work being done. Both volunteers who know they aren't doing well and those who think they should be congratulated for good work will think less of the volunteer effort, if some sort of evaluation is not conducted.

NEEDS ASSESSMENT AND EVALUATION

Some basic evaluation tips

- Begin with a clear and accurate job description for each volunteer position
- Follow the RAP method
 - Review the past
 - Analyze the present
 - Plan the future
- Listen **at least** as much as you talk (maybe more)
- Be cautious not to review personality traits, shortcomings, etc. but stick to the volunteer job responsibilities at hand
- Make certain at every stage that volunteers are not feeling badgered and know that they are valued, appreciated members of the organization's team
- If a challenge or need is identified – take action. If it becomes obvious, for example, that a volunteer's time and talents are mismatched in an opportunity, offer that person alternatives in their service