Trends, Tips and Tools for Volunteer Management

A complete guide to building and enhancing your *Faith in Action* program

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Faith in Action®, a nationwide interfaith volunteer caregiving program of The Robert Wood Johnson Foundation® (RWJF), fosters caring relationships between volunteers of all faiths and their neighbors with long-term health needs. Since 1983, RWJF has been supporting community volunteer efforts. The original pilot initiative, the Interfaith Volunteer Caregivers Program, provided funding for 25 sites (Generation I). It proved successful, and in the 1990's RWJF funded an additional 1,091 sites (Generation II) for the first time under the name *Faith in Action*. In the current initiative, additional sites (Generation III) will be funded to help make *Faith in Action* part of the fabric of America. These projects have made it possible for houses of worship of all faiths, volunteer organizations and social service and health agencies to form effective coalitions that provide informal volunteer services, care and companionship to individuals with long-term health needs.

The National Office of *Faith in Action* is located at Wake Forest University School of Medicine. The *Faith in Action* national office provides technical assistance and grant support to help local *Faith in Action* programs develop and achieve sustainability. The five essential elements of a *Faith in Action* program include an **interfaith** coalition that mobilizes **volunteers** to provide informal **caregiving** to help people with **long-term health** needs in their **home.**

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PREFACE

Volunteer management, regardless of the size of your organization, is critically important to the success of all *Faith in Action* programs. According to a recent study on sustainability commissioned by The Robert Wood Johnson Foundation and conducted by Public/Private Ventures, several key indicators for success relate to meeting the volunteer needs of the organization. The study results demonstrate the importance of careful attention to recruiting, training, supervising and retaining volunteers. Whether you are a director just beginning your *Faith in Action* program or a seasoned director with many years of experience in volunteer coordination and management, this resource offers a cadre of proven tips and tools to help you reach your volunteer goals and thus serve the needs of your community.

Tailored to address the complex issues faced by programs working with volunteers from diverse faith groups and the community at large, this comprehensive volunteer management guide is structured to be "user friendly" with detailed chapter outlines that will make it easy to find just what is needed. Highlighted is information such as national trends in volunteer management, examples of tips from local *Faith in Action* programs and sample tools for operational needs. Other topics include how to effectively recruit volunteers, manage problem volunteers, establish a volunteer advisory board, minimize risk in your volunteer program and much more.

The mission of *Faith in Action* is to bring together people of all faiths or no faith at all to serve their neighbors with long-term health needs. We are so fortunate to have thousands of volunteers joining us in this effort. They are our most precious resource. It is our hope that this manual will be useful in mobilizing and strengthening efforts to achieve the service goals for *Faith in Action* programs across the country.

Faith in Action National Office

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National Perspective on Volunteering

1

OVERVIEW

FAITH IN ACTION

Though each *Faith in Action* volunteer program and the community that supports it is unique, your program is not too small to be affected by national trends. New directions in volunteer management methods and shifting currents in volunteer service present constant challenges for volunteer program leaders. Understanding the demographic and societal changes that shape the service environment can help you to plan more successful recruiting campaigns, develop stronger supervision and retention strategies and place volunteers more effectively.

Even at the local level, volunteer management does not happen in a vacuum. Volunteer programs operate in unique communities shaped by larger social forces that determine the services required, the volunteers available and the expectations of volunteers and care recipients. Trends in demographics, time constraints, access to resources and the use of technology can all have a profound impact on volunteers' expectations of their service roles and what they bring to local *Faith in Action* volunteer programs.

Online volunteering, episodic volunteering and family volunteering are just a few of the current trends reshaping the work of volunteer coordinators in the twenty-first century. This opening chapter discusses major trends that affect volunteer management and suggests some steps that *Faith in Action* programs can take to meet the challenges and make the most of opportunities in a changing environment.

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NATIONAL TRENDS IN VOLUNTEER MANAGEMENT

Volunteering in America is a dynamic activity defined by changing social conditions, values and lifestyles. New forms of volunteering emerge in response to changes in the social environment. Episodic volunteering, family volunteering and online volunteering are three widespread examples of these new developments.

Every volunteer program has its own unique history and characteristics. *Faith in Action*, for example, has a history of recruiting volunteers through faith groups in the program's coalition. This well-established organizational approach is important to consider as you develop and refine recruitment strategies, but there are other national trends that can affect recruitment as well. Even within the traditional volunteer pool of *Faith in Action* volunteer programs—local faith groups—individuals are also part of national trends that have an impact on their volunteering.

The aging of the Baby Boom generation, for example, means many congregations may find themselves with a growing number of older volunteers who have more time, less money and broader skill sets to offer. Volunteer managers should understand that older adult volunteers may be less likely to volunteer for unchallenging administrative tasks or for large time blocks that would limit their ability to do paid part-time work to supplement their retirement funds or to be caregivers for their parents or grandchildren. Volunteer programs may need to adapt to this changing reality in several ways, such as offering a range of small to large time blocks for volunteering, expanding the responsibilities of volunteers to include more complex tasks, changing the hours for the program or offering more diverse volunteer activities and services.

Understanding such national trends and how they play out in local communities and congregations can help *Faith in Action* volunteer coordinators design stronger and more effective volunteer programs.

Responding to Trends

It is the responsibility of volunteer coordinators to assess their volunteer programs as well as the demographic fluctuations and changing needs of the local communities they serve and to adapt the programs' volunteer management strategies accordingly. As you read about key trends in volunteering, as described in the next section, ask yourself these questions:

- Are any of these trends evident within my volunteer program, among volunteers, staff or care recipients?
- Does my community counter the trend in any of these areas? For example, do I have more young people moving into my community than older adults?
- In light of the trends in my own community, do I need to adapt my screening process, recruitment strategies, placement or matching options or training opportunities?

An example of one volunteer program's response is described below. What would you do differently? Which responses are new to you? Which responses have you already tried?

EXAMPLE

Delivering Bilingual Services

In one large metropolitan city, a predominantly African-American community experienced an increased number of Spanish-speaking refugees from Peru moving into their community. This shift in community demographics compelled a local community volunteer program to adapt its services.

The volunteer coordinator adapted the program by taking the following actions:

- Establishing a strong link within the community by recruiting volunteers who directly represented the Spanish-speaking community. By diversifying the volunteer force, potential care recipients in the targeted community were made to feel welcome and program outreach was more effective.
- Building language translation into the program budget and recruiting bilingual volunteers to serve as translators. Cultural and linguistic changes within the community also compelled volunteer coordinators to revise or supplement program materials (such as brochures, inserts, flyers and pamphlets).
- Providing orientation and training sessions in Spanish to help potential volunteers understand the program mission, policy, procedures and position descriptions. Bilingual volunteers were "trained to train" and facilitated orientation and training for Spanish speakers. The volunteer program coordinator also incorporated into all program orientations a summary description, in both English and Spanish, of the populations served by the volunteer program.
- Collaborating with other human service agencies and faith congregations to share resources in reaching out to this population.

EXAMINING KEY TRENDS

Episodic Volunteering

The number of hours that individuals can devote to volunteering has been shrinking over the last few decades, in part because of increases in two-income families and single-parent households, the growth of the "sandwich generation" (adults who care for both children and aging parents) and the extension of the average workweek beyond 40 hours. Many willing volunteers may therefore have less free time. A 1998 study by Independent Sector found that 79 percent of Americans who do not volunteer would do so if there were more short-duration opportunities available. These realities explain the trend toward short-term or "episodic" volunteering. Episodic volunteering offers individuals the flexibility they need while providing essential services to the community.

For *Faith in Action*, episodic volunteers can provide single or one-time services that enhance ongoing caregiving services—such as seasonal needs, home safety checks, outdoor chores, holiday basket delivery and special events planning. *Faith in Action* programs that mobilize episodic volunteers introduce new blood into the volunteer pool and develop reliable sources of volunteers who can meet the program's immediate and hopefully long-term needs. Today's episodic volunteers may develop into next year's volunteer caregivers. For more information on how to include episodic volunteers in your program, see Chapters 2 and 4.

Technology

Technology has affected both volunteering and volunteer management. Many volunteers have access to the Internet and e-mail at home or at work. They may look for volunteer positions by searching online databases or locating a specific program's Web site through a search engine. These plugged-in volunteers expect communication to be electronic as well as face-to-face. Many volunteers are more technology-savvy than the volunteer programs they work with and have access to better technology.

Meeting their expectations can be a challenge for volunteer coordinators. Some volunteer programs have responded by developing e-mail distribution lists that:

- Alert volunteers to different types of needs, such as open slots at the front desk, licensed drivers for an outing or deliverying blankets for children with disabilities
- Encourage participation in volunteer training events
- Inform or remind volunteers about special events

- Allow for volunteers' hours to be submitted via e-mail
- Create opportunities to provide feedback on the volunteer program

New volunteer opportunities are also emerging based on the increased use of Internet technologies. For example, a *Faith in Action* program in Maine recruits youth volunteers to tutor elderly and isolated care recipients on how to use e-mail. The *Faith in Action* program solicits donated computers and online service for care recipients in need. Once the care recipient is trained, the young tutor becomes an e-mail penpal. This special volunteer opportunity often leads to other caregiving support by young people and their families.

Faith in Action volunteer coordinators may want to consider whether there is a place for online volunteers in their programs. Volunteers who work at a distance from the main site might take on projects such as developing and translating materials, designing and managing Web sites or other tasks that are not necessarily centered on the traditional personal relationships which remain the favored core of *Faith in Action* volunteer programs.

Conversely, volunteer coordinators can't assume that all volunteers have access to computer technology; some do not. Bridging this digital divide between the volunteers and volunteer programs is another ongoing challenge.

It is not only volunteers who are posing electronic challenges for volunteer programs. Many funding agencies now require volunteer activity reports that require the use of increasingly sophisticated tracking systems. Volunteer program managers, depending on their resources, may find themselves investing in volunteer tracking software, developing their own volunteer database or making do with an old-fashioned calculator. For more information on trends in program evaluation, see Chapter 9.

Collaboration

Whether volunteer managers like it or not, no volunteer program is an island. Funding agencies, government grant programs and necessity require most volunteer programs to enter into collaborations and partnerships to provide services. This can present both challenges and opportunities to volunteer programs. Clashing missions and organizational cultures can bleed program time and resources away from delivering important services. But collaboration can also present amazing opportunities to leverage resources in ways that provide more lasting solutions and meet the needs of greater numbers of care recipients. Certainly, this is the goal that motivates *Faith in Action* coalitions of faith groups, community agencies, corporations and other stakeholders.

A successful partnership is a mutually beneficial relationship in which each partner has needs and brings value. In planning for the continued success of a volunteer program, it may be extremely helpful to build long-term partnerships with key agencies and even key businesses in the community. The challenge is to figure out how best to fit the volunteer program into an effective coalition of partners. For guidelines and suggestions to help you develop effective partnerships and coalitions, see Appendices 1A–1D.

National Resources and Organizations on the Web

To learn more about the volunteer sector or find out about volunteer opportunities across the United States, check out the following Web sites:

- Alliance for Information and Referral Systems (AIRS) - www.airs.org
- America's Fraternal Benefit Organizations - www.nfcanet.org
- American Red Cross - www.redcross.org
- Association for Volunteer Administration (AVA) - www.avaintl.org
- Citizen Corps - www.citizencorps.gov
- City Cares of America - www.citycares.org
- Corporation for National and Community Service - www.nationalservice.org
- Federal Emergency Management Agency - www.fema.gov
- Humane Society of the United States - www.hsus.org
- International Association of Emergency Managers (IAEM) - www.iaem.com
- International Association of Fire Chiefs - www.iafc.org
- National Association of Planning Councils - www.communityplanning.org
- National Emergency Management Association (NEMA) - www.nemaweb.org
- NVOAD - National Voluntary Organizations Active In Disaster - www.nvoad.org
- Points of Light Foundation & Volunteer Center National Network - www.pointsoflight.org
- The Salvation Army - www.usn.salvationarmyusa.org
- United Way of America - www.unitedway.org
- The UPS Foundation - www.community.ups.com
- US Chamber of Commerce - www.uschamber.com
- USA Freedom Corps - www.usafreedomcorps.gov
- Volunteer Center National Network - www.1800volunteer.org
- Volunteer Match - www.volunteermatch.org

TIPS

Tips for Building Successful Coalitions

- Develop a highly focused, common, unifying purpose.
- Involve members in establishing goals, objectives and activities. (Many *Faith in Action* programs host quarterly coalition meetings.)
- Establish clearly defined operating procedures.
- Articulate clear role descriptions for coalition partners. (For a sample Memorandum of Understanding between *Faith in Action* and another organization, see Appendix 1E.)
- Seek the support and influence of key people in the community.
- Use a common vocabulary and an effective means of communication. (Ensure all coalition members receive a *Faith in Action* newsletter which is sensitive to interfaith issues.)
- Create shared leadership. (Engage coalition members in board service or committees.)
- Require a time commitment from all members.
- Implement procedures for measuring agreed-upon goals and objectives.

Engaging Corporate Volunteers

Many coalitions include businesses and employee volunteer programs. To engage corporate volunteers, create a yearlong calendar of activities and let each event build upon the previous work the volunteers have done. Corporate volunteers can be cultivated on an individual basis to help fill ongoing volunteer roles at partnering agencies and help bridge the time gap between larger group projects.

Diversity

All segments of the American population volunteer—from the very young to the very old, both male and female, at all economic levels, of all religions, of all racial and ethnic groups, in every size of community and in every region of the country. It is safe to say that all Americans volunteer at some point in their lives, whether they know it or not.

This picture is colored by two other truths: some people are more likely than others to identify what they do as volunteering and people volunteer in different ways. People with more education or middle-to-upper incomes, women, Caucasians and people within certain age groups are more likely to identify themselves as volunteers. But all groups of Americans volunteer, in ways that are consistent with their own cultures, traditions, values and realities. People in low-income communities, for example, tend not to think of themselves as volunteers. They see themselves as just helping out or being good neighbors. People who volunteer within religious organizations may consider their service as part of the responsibilities of their faith rather than as a volunteer role.

The diversity of the volunteer experience is a trend that researchers and volunteer program managers are just beginning to recognize. Understanding how people view their volunteering is an important part of a volunteer coordinator's role.

Mandatory Service

Within the last decade, lawmakers have found ways to mandate community service through a variety of programs. On the assumption that giving back to the community can have benefits for those who volunteer as well as for the programs served, compulsory community service has been instituted for a variety of groups. Volunteering is seen as a way to accept responsibility for one's actions, provide in-kind restitution, learn and practice life skills, develop self-esteem, gain understanding of other people or build positive civic values.

Several groups have seen a rise in mandatory community service:

- High school students with community service credit requirements
- Scholarship recipients from local colleges or universities
- Welfare recipients
- Public housing residents
- Alternative sentencing program participants in the criminal justice system
- Citizens for whom community service is an alternative to paying local taxes, fees or fines

Some observers of this phenomenon believe that nearly every governmental benefit program could eventually include some requirement for community service. This means that volunteer programs may see an influx of volunteers from populations with little or no volunteering experience.

Mandatory service currently falls into three broad categories: service-learning, public housing service and court-ordered community service. Upon careful reflection and consideration, *Faith in Action* programs should establish general guidelines as to what extent they will accommodate mandatory service.

Service-learning credit may be awarded to high school students as a graduation requirement or to college students as part of an academic core requirement or scholarship. Service-learning may be mandated by specific school districts, enacted by college boards or voted into law by state legislatures. Service-learning may also be a voluntary part of a course curriculum. The goals of service-learning can be specific (to meet academic goals and objectives or provide structured time for students to reflect on their service and learning experiences) or more general (to foster empathy, personal values, awareness, self-esteem, self-confidence and social responsibility). Many schools have a volunteer coordinator who works with outside agencies to create service projects for students. Some college campuses and school districts also have a central volunteer clearinghouse that volunteer programs can contact, such as a service-learning coordinator or community service office.

Public housing service generally is mandated for people who live in housing projects or who receive government assistance with housing costs. With revisions in welfare regulations, many government programs are adding a community service requirement for participants. Check with your local social service agency that manages housing block grants to find the volunteer contact for these types of programs.

Court-ordered community service is an alternative sentencing option for individuals in the criminal justice system. Volunteer centers often receive calls from family courts, juvenile courts and public defender programs asking for opportunities for their clients. Community service requirements may be handled through adult probation, teen court programs or the juvenile court system.

The pool of inexperienced volunteers from mandated community service programs presents some challenges in creating volunteer positions. If *Faith in Action* programs decide to work with mandatory service programs, volunteer program managers may need to reassess volunteer positions and compile tasks that match the skill levels of short-term recruits with entry-level skills, little work experience and no time for extensive training. It will be hard to make these jobs interesting or rewarding. Volunteer coordinators may opt to cluster these positions around projects or events. The good news is that many of these volunteers are available during core work hours—Monday through Friday, 9 to 5—when it is traditionally difficult to schedule volunteers.

TIPS

Working with Court-Mandated Volunteers

If you choose to work with court-mandated volunteers, consider the following suggestions:

- Check in with your local Volunteer Center by calling 1-800-Volunteer to find out what programs are available.
- Provide a list of your volunteer opportunities to local probation departments and periodically update it. Add probation departments to your monthly newsletter mailing list.
- Develop volunteer positions that can meet your needs as well as the needs of the court-mandated volunteers. These might be volunteer projects that can be done at home or in central locations such as a job center or detention center. Some examples include sewing blankets or comfort pillows; creating bookmarks, tent cards or greeting cards; and stuffing envelopes for large donor mailings. (Many of these same projects may also work for stay-at-home parents, a classroom of volunteers or volunteers who can't get out during regular hours because of health or work issues.)

Think carefully about these program considerations:

- What types of offenses, if any, would not work for your program and job assignments?
- Do additional screening procedures or policies need to be adopted?
- What tracking or record keeping do the courts require? Who is the contact person if problems arise?
- Can you include activities that will provide useful job skills or help the volunteers develop relationships with others?

Emphasis on Evaluation

Another national trend is the rising expectation on the part of funding organizations for volunteer programs to clearly illustrate how they are helping the community. From government grantors to foundations, funders now require service programs to back up their claims to success with real numbers. For *Faith in Action* volunteer programs, this means demonstrating how volunteer caregivers have a positive impact on the lives of people with long-term health concerns.

Program evaluation can also be a way for volunteers and care recipients to have a voice within the program. Regular questionnaires that assess the satisfaction level of care recipients or assess the effectiveness of volunteer intervention will help care recipients maintain a sense of power over their lives. Volunteers who are given opportunities to provide feedback can offer suggestions for improving services. For more information on program evaluation and feedback, see Chapter 9.

WHO IS VOLUNTEERING?

Who isn't volunteering? At some point, nearly every American will provide some unpaid help to someone somewhere. However, there are several emerging trends in volunteer demographics, and volunteer coordinators can capitalize on these trends to create more powerful recruitment and retention programs. For more information on how to respond to these trends and engage members of different volunteer audiences, see Chapter 4.

Faith Groups

At the beginning of the twenty-first century, two broad trends are affecting religious groups. First, Americans who contribute to or volunteer with religious groups give more time and money than those who are only involved in secular activities. A 2002 Independent Sector report on faith and philanthropy indicates that households that give to both religious and secular causes give more money and volunteer more time than those who give to just one type of organization. Among households that contribute time or money, 58 percent give to both religious and secular organizations (10% give only to religious congregations and 31% give only to secular organizations). Religious belief, this trend shows, is one of the most important factors influencing levels of giving.

Observers credit this trend to a growing emphasis within faith groups on sharing resources as an article of faithful witness, serving as an example of responsible living in civic society and cultivating generosity and involvement. Such practices, they say, make real contributions to the well-being of communities.

Volunteer coordinators may wish to keep the following Independent Sector findings in mind when targeting their recruitment campaigns to faith groups:

- People who regularly attend religious services are more likely to volunteer.
- Fifty-four percent of regular church attendees volunteer, while only 32 percent of non-attendees volunteer.
- Frequent church attendees (29% of all volunteers) account for nearly 70 percent of volunteer hours each month.

A second trend may present different challenges for volunteer coordinators who are hoping to increase volunteers from faith groups: The number of Americans who say they have no religious preference has doubled between 1990 and 2000. When seeking to locate new volunteers, these trend factors reported in The Christian Science Monitor in 2002 may be important to keep in mind:

- Socially conservative denominations grew faster in the last decade of the twentieth century than any other group.
- The overall increase in religious affiliation did not match the rate of increase in the U.S. population.
- Almost half of all Americans do not claim any religious affiliation, although many do profess a belief in God.
- The rapid increase in membership reported by some religious organizations are linked to immigration.
- Many Americans identify with a specific religion even though they do not have a formal connection to a place of worship.

Young People

Since 1990, there has been a steadily growing interest in engaging young people in service. Research shows that service is an important way for young people to develop self-esteem and to learn and practice life skills. Service is also seen as a way to encourage citizenship values and divert young people from drug and alcohol abuse and criminal behavior.

Volunteer programs that engage young people, either individually or as part of a family or other group, often find they become lifelong volunteers. By fostering the volunteer spirit in young people and providing them with opportunities to serve, volunteer programs create a legacy that will enrich communities and the nation for decades to come.

Many programs include young people on their boards and advisory councils. Young people's input has sometimes reshaped the direction and focus of programs, as they provide a fresh perspective on the needs and resources of our communities.

Older Adults

Today's older adults want to use their life experiences and talents to make a difference. They are also looking for intellectual challenges. Their attitudes toward volunteering and community service reflect their general approach to retirement and later life. While older adults express a strong desire and willingness to be involved in volunteer activities, they are seeking meaningful opportunities that take advantage of their special gifts, rather than activities that merely fill time.

While a majority of older adults in America express interest in incorporating volunteer and community service into their retirement plans, those who have not yet retired express even more interest. Research in this area suggests that the emerging generation of older adults may flood our nation's civic institutions in the next decades.

Older adults age 50 to 75 express the need to feel important, remain busy, maintain social connections and feel needed by others. Notably, women and better-educated older Americans are particularly enthusiastic about incorporating volunteer opportunities into their retirement years.

EXERCISE

Adapting to Senior Volunteers

Did you know the average *Faith in Action* volunteer is a 57-year-old woman? Why do you think women and better-educated older Americans are more enthusiastic about incorporating volunteer opportunities into retirement? Some possible answers:

- Women have longer life expectancies and may believe they will need to make more out-of-home human connections.
- Better-educated adults may feel they have more skills to offer and can finally do what they want with their skills.
- Better-educated adults may have had higher paying jobs and retirement savings and thus can afford to spend less time supplementing their incomes.

What other reasons can you think of? What could this mean to your volunteer program?

- Will your new senior volunteers be serving senior care recipients who have fewer opportunities?
- Could you create buddy programs to involve senior volunteers with senior care recipients?
- How would you design volunteer positions to meet the different needs and skills of senior volunteers?
- For seniors who want more human connection and social interaction, will a volunteer team or volunteer partner approach be more satisfying?

Families

One increasingly popular trend is family volunteering. As early as 1987, a survey revealed that 55 percent of non-volunteers felt that involving their families would be an important incentive to getting them to volunteer.

As defined by most volunteer programs, families come in all shapes and sizes, including families with no children, two- and one-parent homes, blended families, members of group homes for people with disabilities and members of fraternities or sororities. The most common type of family volunteering involves nuclear families (60%) and the next most common involves adult couples without children (25%).

Families are trying to stretch their precious free time to fill many needs. Family volunteering allows families to spend quality time together, see family members from a new perspective, discover new talents, build relationships, teach values and volunteer with someone familiar. In addition to enriching their family time, *Faith in Action* can provide family volunteers with a unique opportunity to affirm their religious values and faith together.

Business Employees

In the past 30 years, volunteering has become a recognized part of the workplace environment. The concept of workplace volunteering emerged in America in the 1970s as part of a movement towards corporate social responsibility. Today many businesses have some form of employee volunteer program. These programs may include central clearinghouses that match volunteers with programs, teams of employees who arrange group volunteer projects or human resource policies that allow employees to volunteer a certain number of hours per month on company time. At the heart of this trend is the idea that volunteering is beneficial to the community, the employees and the company. Businesses with extensive and sustained volunteer programs see them as part of the overall business strategy of the company. At many *Faith in Action* programs, members of employee volunteer programs can work in care teams that offer assistance in areas that match their companies' overall goals. For more information on working with employee volunteers, see Chapters 4 and 5.

People with Disabilities

Congress passed the Americans with Disabilities Act in 1990. Essentially a civil rights act, it was the culmination of decades of advocacy on the part of people with disabilities, their families and supporters. Their goal was to move people with disabilities into the mainstream of society.

There are more than 30 million people with disabilities living in the United States. They attend worship services, go to schools, get involved in clubs, participate in civic activities and engage in community life. You can assume that individuals with differing abilities or physical, mental or emotional challenges are in the audience when you present information about your program at schools, faith gatherings and clubs.

Expectations are higher today among people with disabilities that they will be able to work, volunteer and play wherever their interests and talents can take them. This means your volunteer program may be likely to encounter people with disabilities who are seeking opportunities to volunteer rather than seeking services.

People with disabilities are waiting to be asked to volunteer. To recruit from this growing pool of volunteers, program communications should make it clear that people with disabilities are welcome and the program is eager and prepared to work with them.

Members of Low-Income Communities

Low-income neighborhoods may not provide many of the supports needed by families and individuals to live healthy and productive lives. While volunteers are abundant in low-income neighborhoods, they do not refer to themselves as "volunteers" but as "willing workers," "block captains," "community workers" or "leaders." Nor do they generally volunteer for nonprofits. Rather, their volunteering tends to happen through neighborhood associations, the faith community and on an individual basis.

Residents of low-income neighborhoods encounter their own particular barriers to volunteering. These include lack of time, financial resources, childcare or transportation; low self-esteem and confidence; negative perceptions of volunteering and volunteer organizations; and cultural and language barriers. Yet mobilizing volunteers in low-income communities is well worth the effort. Volunteer opportunities that create sustainable change, strengthen families and transform neighborhoods may hold the key to solving many difficult social problems.

TIPS

Working with "Tough" Communities

Since 1996, the Points of Light Foundation in partnership with the Annie E. Casey Foundation has explored the role that volunteering plays in transforming low-income neighborhoods into communities that support families. Their research has produced these guidelines for working with people in what are known as "tough" communities:

- Partner with neighborhood residents from the very beginning.
- Empower communities to help themselves. Outsiders cannot "parachute" into the community to rescue residents. Residents must be part of the planning.
- Make sure projects are important to the lives of community members.
- Be respectful of all that community members have to offer.

- Provide resources to enable communities to be self-supportive.
- Cultivate community members' skills and talents. Identify and use the gifts and talents of local residents and convince residents that they have skills to bring to the table.
- Strengthen existing community leadership. Programs should identify existing leaders and develop new ones. Local leaders can help to build trust and ensure that local perspectives and experiences are considered. Consider inviting neighborhood councils or associations to join the *Faith in Action* coalition.
- Ensure community readiness. Building relationships and involvement is a process that needs patience and flexibility. Communities may need help in resolving conflicts that impede residents' involvement.
- Promote family volunteering as a great way to empower families. Family volunteering shares values, encourages positive interaction and reduces barriers.

Government Volunteers

Government has a long history of engaging volunteers and developing opportunities for citizen service. In 1991, President George Bush created the Points of Light Foundation as a national advocacy organization for volunteering. In the early 1990s, President Bill Clinton created the Corporation for National and Community Service as a home for national service and community volunteering. In 2002, President George W. Bush developed the USA Freedom Corps initiative to involve more citizens in voluntary activity, in order to help solve serious social problems and develop a homeland security infrastructure. Government at all levels—national, state, and local—provides leadership, resources and programs for volunteers. But government also engages many volunteers. A 1998 study by Independent Sector showed that 25 to 30 percent of all volunteers in America give their time to agencies of government—local schools, parks and social welfare and correctional programs. The Internal Revenue Service alone engages 100,000 volunteers each year to help people fill out tax returns.

Government has its own internal infrastructure of volunteer coordinators who promote and support programs. It is highly likely that at some time in the future, your volunteer program will collaborate with a government volunteer program or citizen service initiative, such as Volunteers In Service To America (VISTA) or AmeriCorps. Many other *Faith in Action* programs have already done so.

WHY DO PEOPLE VOLUNTEER?

Volunteer Personalities

Volunteers can be motivated to volunteer as much by their own personality as by any external factor. Three major personality types flourishing in the volunteer pool are the Achiever, the Affiliator and the Empowerer.

The Achiever is motivated by tangible accomplishments, likes to see results and responds to clear measures of the output of volunteer effort. The Affiliator is motivated by social interaction, likes to be with people and finds that belonging to a group is important. The Empowerer likes to influence decisions and is motivated by status and position, enjoys debate, likes to be with important people and wants to be in charge.

Altruism is also a motivator for many people. Based on religious, social or philosophical traditions, many volunteers experience a call to service and believe helping is a necessary part of a complete and good life.

Understanding the internal motivations of volunteers can help coordinators to create volunteer positions that attract the right volunteer personality for the job.

TIPS

Incentives for Volunteering

Which of the following incentives are aspects of your program's volunteer positions? Think about ways to highlight these incentives in ads or flyers that promote the position.

- Gaining a sense of satisfaction
- Developing professional contacts
- Fulfilling personal or religious beliefs
- Getting ahead in the corporation
- Providing companionship or meeting people
- Getting training and experience
- Learning about a field
- Gaining entry to a particular organization
- Creating or maintaining an organization
- Obtaining social prestige

A VOLUNTEER SNAPSHOT--THE WHO, WHAT, WHEN, WHY AND HOW OF VOLUNTEERING

A variety of studies and sources reveal these interesting volunteer trends and statistics:

General Statistics

- About 109 million people volunteered a total of 19.9 billion hours in 1998, an average of 3.5 hours per week.
- Volunteers give more to charitable causes than non-volunteers. Contributing households with at least one family member who volunteers give a much higher percentage of their household income than contributing households that do not have a volunteer.
- Volunteers cite these reasons for volunteering as the most important: feeling compassion for those in need (86%), having an interest in the activity or work (72%), gaining a new perspective (70%) and knowing the importance of the activity to people whom the volunteer respects (63%).
- People report three different ways of learning about their volunteering activities: through someone asking them to volunteer, through participation in an organization or through a family member or relative.
- For 41 percent of volunteers, service may be a sporadic or one-time activity. An almost equal number (39%) of volunteers preferred to volunteer at a scheduled time—weekly, biweekly, or monthly.
- A small number of volunteers (9%) reported volunteering only at special times of the year, such as Christmas or Hanukkah.

Senior Volunteer Trends

- In 1998, only 45 percent of seniors aged 55 and older were asked to volunteer.
- Among seniors aged 55 and over, 48 percent volunteered at least once in 1998, a 4 percent increase since 1995.
- Almost two-thirds of volunteers aged 55 and over discovered volunteer assignments through their places of worship.
- More than 50 percent of senior volunteers report that they volunteered because they wanted to give back to society some of the benefits they received individually.

Youth Volunteer Trends

- Teens were nearly four times more likely to volunteer if they were asked than if they were not. Of the teens who reported being asked to volunteer, 93 percent actually did. Of those who were not asked, only 24 percent reported having volunteered.
- Formal course work in community service appears to serve an important function in encouraging volunteering. Although teens reported preferring the choice to engage in service activities voluntarily, most did not react negatively to programs requiring service.

Family Volunteer Trends

- The top three areas for which family volunteers gave their time were informal volunteering on an ad hoc basis (50%), volunteering with religious organizations (50%) and youth development (41%). (Respondents could choose more than one area).
- Volunteering provides a variety of personal benefits and satisfactions, in addition to the benefits received by nonprofit organizations and society as a whole. Social service agencies cited the following benefits of family volunteering:
    - Adults and children share a common goal and purpose (76%).
    - Volunteering strengthens the family unit (74%).
    - Child volunteers become adult volunteers (74%).
    - Family volunteering builds a sense of community (71%).
    - Family members interact with diverse cultural and economic groups (70%).
- More than 97 percent of agencies that involved families as volunteers found it to be very effective.
- More than 96 percent of agencies said family volunteering offers unique ways to provide services.
- More than 98 percent of agencies said family volunteering benefits families above and beyond volunteering alone.

Appendix 1A

Four Steps to Successful Coalitions

How would you guide your *Faith in Action* volunteer program as it seeks to form ongoing coalitions with faith groups, businesses, and nonprofit and governmental agencies?

1. Know your program.

Before approaching potential coalition members, consider your program's goals, needs and resources. Use the following questions as a guide:

- What are the program's needs?
- What are the program's wants?
- What can the program offer?
- Do you have in place the basic management skills and systems required to mobilize volunteers effectively?
- Have you made the organizational commitment to provide the leadership and management support, whether paid or volunteer, that a new partnership will require?

2. Know your prospects.

Once you understand what you need from a potential coalition member, research the prospects in your community. Your local Volunteer Center, Corporate Volunteer Council, Chamber of Commerce, Ministerial or Interfaith Alliance and United Way can help familiarize you with the businesses, faith groups, nonprofit groups and agencies in your area.

- How do the mission and work of these organizations help you to meet your goals (e.g., visibility, employee interest)? What can they offer?
- What do they want from you in return?
- How can you approach them?

3. Manage your agreements.

Develop coalitions based on your *Faith in Action* program's strengths. Match your program's needs with the opportunities that potential partners can offer. What value will they bring? Wrap up your negotiations with clearly written communications. A memorandum of understanding might include your common vision, measurable goals, specific listing of needs and resources, delineation of responsibilities and an outline of the process.

4. Manage the relationship.

Successful coalitions mean managing the relationships, not just the deal.

- Check your actions against the points of agreement.
- Document your progress and accomplishments.
- Frequently check in with coalition members to compare experiences, share progress, and review expectations.
- Communicate the successes of your coalition and recognize volunteers who participate.
- Along the way, reassess your needs and those of other coalition members.
- Be willing to adapt your agreement to meet changing realities among coalition members.

Appendix 1B

Identifying Resources from Coalition Partners

Directions: Using the sample issue below, brainstorm and list resources that each partner could bring to help address the issue. Don't attempt to develop programs to solve the issue; focus rather on existing resources that could assist in addressing the issue.

Issue: AIDS has become a chronic disease, as people with AIDS or HIV are living longer. Yet they need support to live independently and increase their quality of life.

What resources—in-kind services, materials, funding, talent and expertise, connections and access, etc.—can each partner bring to this community's needs?

Schools & universities	
Businesses	
Nonprofit organizations	
Faith groups	
People usually on the "receiving end" of volunteering	
Government agencies	

Appendix 1C

Building Relationships into Partnerships

Some suggestions for working with corporate partners and other coalition members:

- Research the company before you make contact. Read the annual report. What issues or organizations does it usually support? Know the names of key contacts such as the CEO and public or community relations director. In the case of faith groups, know what services and programs they already provide.
- Make your first meeting a "getting to know you" time rather than a hard sell. Present the concept and ask for feedback and ideas on the concept. Ask if you can submit a memorandum of understanding by a specific date.
- At the conclusion of a project or fund raiser, always send your contact a letter of thanks and copy the supervisor and perhaps the CEO.
- Include articles about your partners in your organization's newsletter. Send a copy of the article to your contact and ask if it would be appropriate to send a copy to the CEO and the public relations department, along with a letter explaining the work your corporate contact did on behalf of your organization.
- Link people on your board with your coalition contacts; create relationship-building opportunities for others whenever you can.
- Send meeting agendas a few days in advance of the meeting. Manage these meetings very tightly by placing a time limit next to each item—and stick to it.
- Always indicate on the meeting agenda the specific outcomes you are looking for as a result of the meeting.
- Schedule meetings at the beginning of the day rather than the end of the day when people may need to cancel.
- Ask about other successful partnerships the organization has experienced.
- Prior to fund raising, allow coalition members to get to know the nonprofit organization and become its advocate.
- Be clear and concise, and stick to the "keep it simple" principle whenever you can.

Appendix 1D

Making the "Ask" to a Potential Coalition Member

Considering one or more needs of your volunteer program, write a draft of a proposal to partner with another organization. You may wish to do the following:

- List the main points of your case.
- Ask clearly for volunteers and other resources as needed.
- Make the "ask" a win-win proposition, with the emphasis on benefits to your care recipients and the community.
- State your next step.

Appendix 1E

Sample: Memorandum of Understanding and Agreement
(This form can be adapted to suit the needs of your *Faith in Action* program and the needs of your coalition members.)

MEMORANDUM OF UNDERSTANDING AND AGREEMENT
between
Faith in Action
and
(NAME OF CONGREGATION)

This agreement between *Faith in Action* and (Name of Congregation) seeks to solidify the collaborative partnership between the two organizations, while preserving the rights and privileges of each organization. This agreement seeks to outline the responsibilities of each organization, in the hopes of ensuring a sound working relationship between *Faith in Action* and (Name of Congregation). This agreement is to be reviewed and renewed yearly.

Faith in Action **agrees:**

1. To promote the partnership between (Name of Congregation) and *Faith in Action*, which may include listing (Name of Congregation) in brochures, flyers, pamphlets, news articles or media announcements. *Faith in Action* will make available to (Name of Congregation) all such materials.

2. To accept volunteer candidates from (Name of Congregation). All volunteers will undergo a screening process to determine if the program is appropriate for them. Volunteers and (Name of Congregation) agree that proselytizing activities will not be permitted.

3. To train, supervise, and support all volunteers. Unless noted in volunteer materials, *Faith in Action* will assume all expenses related to volunteering.

4. To provide general liability insurance, additional automobile insurance and bonding insurance to all volunteers while they perform volunteer duties under the *Faith in Action* name. Volunteers must identify themselves as *Faith in Action* volunteers, carrying with them a *Faith in Action* volunteer nametag. In the case that a volunteer recruited from (Name of Congregation) is providing services to a care recipient from (Name of Congregation), both must be enrolled in *Faith in Action* and said services must be under the auspices of *Faith in Action* in order for the volunteer's actions and services to be insured. *Faith in Action* will not indemnify (Name of Congregation) for activities performed by volunteers under the auspices of (Name of Congregation).

5. To accept referrals for services of members of (Name of Congregation). Should a care recipient be accepted into *Faith in Action*, *Faith in Action* will match a volunteer with a care recipient as soon as possible. The care recipient will not be charged for services.

6. To inform the leadership of (Name of Congregation) of any policy changes that may affect this collaborative partnership. All policy changes will be submitted in writing.

(Name of Congregation) agrees:

1. To promote the partnership between (Name of Congregation) and *Faith in Action*. This may include listing *Faith in Action* in brochures, flyers, pamphlets, news articles or media announcements. Should (Name of Congregation) design any materials highlighting its partnership with *Faith in Action*, (Name of Congregation) will provide said materials to *Faith in Action*.

2. To provide a congregational liaison to *Faith in Action*. The liaison will be utilized to help identify possible care recipients and volunteers for referral.

3. To recruit volunteers for the *Faith in Action* program. (Name of Congregation) will provide a minimum of 5 active volunteers throughout the year. Should the minimum of 5 volunteers be trained and matched, and a volunteer from (Name of Congregation) drop out, (Name of Congregation) will strive to find a replacement for that volunteer.

4. To provide, if possible, meeting space for the recruitment and training of volunteers. Space will be provided as an in-kind donation to *Faith in Action*.

5. To provide referrals of care recipients needing services.

6. To provide endorsement letters for inclusion in fund-raising materials submitted by *Faith in Action* for continuing funding of the program.

7. To pledge an initial financial contribution of $_________ to *Faith in Action* to support program operations and activities, followed, if possible, by annual contributions through budget allocations and fund-raising projects.

The undersigned have reviewed the above and agree to the items outlined. This agreement is in effect for one year from the date when this agreement is signed. Each party may exit this agreement at any time, for any or no cause, provided that the other party is given 30 days notice in writing.

Date ___________ _________________
Project Director *Faith in Action* (signature)

____
(print name)

Date ___________ _________________
Head of Congregation (signature)

____
(Name of Congregation) (print)

Volunteer Program Planning

2

OVERVIEW

The power of the *Faith in Action* model for volunteer programs resides in the call to help one's neighbor, found in virtually all of the world religions. Faith groups have been providing these types of services for generations, with volunteers at the core of these efforts.

To broaden *Faith in Action* volunteer programs, there are advantages to reaching out to the wider community. Involving the community increases public support for your efforts and fosters understanding of the work and planning behind management decisions. With a combination of your interfaith coalition and community volunteers, you can expand existing programs to serve more individuals.

When planning a volunteer program that merges *Faith in Action* coalition members and the community, up-to-date practices and tools become essential. Involving volunteers means proactively recruiting them and engaging them in ways that are fulfilling and appropriate. To create and sustain such a program, volunteer managers must acquire and budget adequate funds, form relationships to link the volunteer program with faith groups, clarify job descriptions and working relationships and create and approve policies to accommodate care recipients and volunteers.

Faith in Action's deeply embedded tradition of service provides a solid foundation for an effective volunteer program. The program planning tools described in this chapter will help you achieve the needed structure.

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PURPOSE OF VOLUNTEER PROGRAM PLANNING

An effective *Faith in Action* volunteer program brings together faith groups and community health and service organizations in a common mission, to provide volunteer care to neighbors in need. Volunteer coordinators structure caregiving services and manage volunteers to help the *Faith in Action* program achieve its mission of providing care for some of the most vulnerable members of the community.

Instituting a new volunteer program or reenergizing an existing one involves a process that covers a range of management functions—from needs assessment, volunteer position development and recruitment, to supervision, evaluation and recognition. These processes are interdependent and together create a synergy that will enliven your volunteer program. Once instituted, an effective approach to volunteer management will perpetuate itself and save the program director valuable time.

For example, the process of developing volunteer position descriptions can simplify some of the most challenging aspects of a volunteer coordinator's job: recruiting, screening, training and supervising volunteers. Position descriptions can serve as tools for recruiting people who have the right interests, skills and availability to fulfill volunteer responsibilities and for matching those individuals to the right volunteer positions. The ability to leverage tools such as position descriptions to support other aspects of the volunteer program is just one benefit of effective volunteer program planning.

This chapter outlines basic steps to take to assess your program's mission, goal and priorities, to build support for the volunteer program; and to design volunteer roles and activities that will fulfill the mission and bring the program to life.

TURNING THE MISSION INTO ACTION

Mission, Vision and Purpose

Effective volunteer program planning begins with the mission of the program. As a volunteer coordinator, you hold an important key to turning the mission into action. It is your job to develop and fill volunteer positions in order to provide the services and care highlighted in the mission. Volunteer programs therefore facilitate the kinds of volunteer participation that will allow the organization to accomplish its mission. Even for established programs, revisiting the mission statement can be helpful when considering an expansion of services or when changes occur in the population or geographic area served by the program.

Mission statements can talk about meeting a need, solving a problem or defining an organization's purpose. An organization's mission statement is usually no more than a brief paragraph that pinpoints its specific reason(s) for being.

An Example of a Mission Statement

Faith in Action is a national volunteer movement that brings together religious congregations from many faiths and other community organizations. The common mission of local *Faith in Action* programs is to help people who are aging and chronically ill maintain their independence by fostering caregiving relationships with volunteers who assist with daily activities.

Often an organization will also have a stated "vision" that expands on the mission with a description of a desired future. The vision is a mental image or view of broad elements that an organization or program wishes to accomplish, based on its mission. The vision clarifies the future the program is trying to create. It has been found that a program's volunteers are most effective when there is a broadly understood and widely articulated vision of the role of volunteers in fulfilling the program's mission.

Examples of Visions for a *Faith in Action* Program

1. Neighbors who are elderly and who have disabilities are able to remain independent in their homes as long as possible, with the support of volunteers of various faiths providing caregiving services.
2. People with Alzheimer's and their caregivers experience enhanced quality of life and independence through the volunteer respite and shopping services of *Faith in Action*.
3. People of all ages with long-term health concerns receive the caregiving and transportation support they need through an interfaith coalition of volunteers.

When considering a direction for your volunteer program that is based on the mission and vision, these are some of the questions to ask:

- What is your organizational mission and vision?
- What are you trying to accomplish in your community?
- What does your mission statement say about your program's view of community needs?
- What does your mission say about how the *Faith in Action* program plans to meet those needs?
- What roles can the volunteer program play in fulfilling the mission?

Use the answers to these questions to help you outline a strategy for using volunteers. Consult with volunteers, staff and others—such as coalition members and board or advisory committee members—who know and understand the organization. Together you can devise a mission-based strategy for working with volunteers. Then you are ready to create a purpose statement for your program. This written statement explains the specific purpose or objective of your volunteer program—why it exists and what it actually does.

Purpose Statement

The purpose of *Faith in Action* volunteers is to provide informal caregiving services to their neighbors with long-term health concerns to help them remain independent for as long as possible and to improve their quality of life.

For a worksheet to help you write your purpose statement, see Appendix 2A at the end of this chapter.

Assessing Needs

Another step in determining how best to turn the mission into action is through a needs assessment in the community. This is important in order to ensure that your volunteer program is truly "for the community" and "by the community." One way to achieve this is to discover exactly which services the community most needs. Many *Faith in Action* programs have done this at some point in their history. It is an essential process at the start of a volunteer program, but can also be integrated into existing programs to keep services fresh and relevant.

An important part of the needs assessment is identifying current volunteer resources and rating the existing level of volunteer services. Are there too few services or a large number of services? Are these services coordinated? How will *Faith in Action* volunteer services complement other programs in the community?

There are several methods for conducting a needs assessment—interviews, telephone surveys, e-mail or Web surveys, mail surveys and focus groups are some of your choices. The pros and cons of different methods are weighed in the following chart. Volunteer programs generally select a method for conducting a needs assessment based on the resources available, staff time and the availability of different types of resources in the community.

For more information on conducting needs assessments, see Appendices 2B and 2C at the end of this chapter.

Methods for Conducting Needs Assessments Interviews

Interviews

PRO
- Can get the highest quality data
- Offers the potential to ask more questions
- Can record nonverbal responses
- Best completion or return rate

CON
- Is expensive
- Takes a long time to complete
- Interviewer bias can skew the results

Strategy Tip: Utilize faith group coordinators to conduct scripted interviews with volunteers or care receivers.

Telephone Surveys

PRO
- Inexpensive
- Short completion time
- Easy to organize
- Can be done after work hours

CON
- Can be perceived by respondents as a nuisance
- Must have trained interviewers or can lose validity and reliability
- Can lose flexibility
- No visual cues or information

Strategy Tip: Ask each board member to call five care recipients and complete a scripted survey over the phone.

Mail Surveys

PRO
- People can remain anonymous
- Can be completed at respondent's convenience

CON
- Very costly
- Low return rate (15%-20%)
- No personal contact
- Need expertise to design questions—can be expensive
- No chance to correct confusion on the part of the respondent

Strategy Tip: Offer an incentive to return the survey—e.g., all respondents are entered in a drawing for a dinner gift certificate (donated by a local restaurant).

Focus Groups

PRO

- Free exchange of information
- Can address various areas of concern
- Uses an experienced facilitator to get the best results

CON

- Need more than one group to ensure the validity of results
- Need to carefully record what is said
- May be difficult to stay on topic

Strategy Tip: Consider asking a local college to provide students from the communication department as facilitators. Remember to assign a note taker.

E-mail/Web Surveys

PRO

- Quick
- Inexpensive delivery
- Reach a lot of people easily

CON

- No personal contact
- Need expertise to design questions—can be expensive
- No chance to correct confusion on part of the respondent
- Responses not anonymous

Strategy Tip: Make a computer with Internet access available in your office or in coalition member offices for people who otherwise might not be able to take an online survey. Also, couple this strategy with a mail or phone survey.

Setting Goals

Goals begin to define the types of volunteer positions that will be needed and the number of people required to fill these roles. Goals also aid in delineating concrete objectives against which the program might be measured and evaluated once in operation. Thus, goals should be specific and measurable and have clear deadlines. (For example: *Faith in Action* will provide weekly respite care to 75 local families each year.) Consideration of goals is not limited to the start of a program; developing and refining goals is an ongoing process.

Overcoming Obstacles

When you have examined your mission and purpose and assessed the needs in the community, it will probably become apparent that there are some obstacles to overcome in achieving your mission. For example, volunteers may need additional skills or there are too many volunteers available in one place when they are needed in another. No obstacle is insurmountable. Consider these steps in analyzing the obstacles and coming up with ways to overcome them:

- Identify obstacles to accomplishing the mission.
- Develop strategies to overcome each obstacle for which volunteer participation would be an effective tool.
- Set goals to implement the strategy.
- Identify resources in the community that can help meet the need. This includes volunteers, coalition members and board or advisory committee members.
- Identify the skills that will be needed by staff and volunteers to implement the strategy.

TIME SAVER

Analyzing Obstacles

Create a chart with each of the steps as a row heading: obstacles, strategies, goals, resources and skills. Record the answers identified in your brainstorming session in the appropriate row. Use this chart when developing written position descriptions, developing trainings or when reviewing volunteer roles.

Obstacles Care recipients who live outside the city limits
Strategies Use volunteers from outside the city limits
Goals Provide friendly visits each week to 25 care recipients outside the city limits
Resources Coalition coordinators at rural congregations, volunteer care teams assigned to a particular geographic area
Skills Access to transportation; familiar with the geographic area; comfortable working with people who are frail or elderly

DEFINING VOLUNTEER ROLES AND RESPONSIBILITIES

What Will Volunteers Do?

You know why your program exists. You have reviewed your organization's mission statement, conducted needs assessments, thought about your program's purpose, examined obstacles and come up with ways to overcome them. Now you can identify or refine specific volunteer roles and responsibilities.

Not all volunteers have the same interests nor seek to serve in the same ways. Providing diverse volunteer opportunities may provide an advantage to *Faith in Action* programs in attracting a wider range and larger number of volunteers.

TIPS

According to a study on sustainability of *Faith in Action* programs conducted by Public/Private Ventures, those programs that provided two or more types of services were more likely than those with only one service to recruit 15 volunteers per year.

Clearly, volunteer positions need to encompass tasks that serve the organization extremely well. How can volunteers help to get things done? When developing new volunteer positions or refining existing ones, keep in mind each of the caregiving and administrative needs that the volunteer program intends to meet. Involve the whole organization in developing a list of possible roles for volunteers. Brainstorm with staff members, selected care recipients, volunteers, coalition members, members of the board and advisory council and even key funders to identify ways in which volunteers can be part of a particular strategy, help overcome a specific obstacle, fill gaps in service or provide a special personal touch. Involving key stakeholders can cut down on approval time if a new volunteer position requires additional resources such as training, certification or equipment.

For help with determining needs for volunteers, see Appendices 2D and 2E.

What Volunteers Can Do Beyond Caregiving

- Write and edit monthly newsletters.
- Create and maintain a Web site.
- Schedule transportation volunteers.
- Phone or e-mail homebound care recipients.
- Answer office phones.
- Maintain a volunteer bulletin board.
- Speak to local faith groups, civic groups and other organizations about *Faith in Action.*

- Write inserts for the weekly bulletins of coalition faith groups.
- Send birthday cards to care recipients and volunteers.
- Assist with training other volunteers.
- Coordinate a team of volunteers from congregation.
- Assist with special events and other fund-raising efforts.

For example, *Faith in Action* of Anytown wants to expand its volunteer care team to include team leaders. The staff decides that volunteers can take on the following responsibilities:

- Train as team leaders to coordinate the activities of multiple project-specific volunteers.
- Assist with planning and executing a special event fundraiser to support the part-time coordinator of team leaders.
- Recruit volunteer team leaders from the program and coalition members.
- Create and monitor an e-mail listserv that fosters discussion among multiple care teams and a volunteer team leader.

EXAMPLE

Volunteer Roles

Faith in Action volunteers who attend a local college in Colorado have made arrangements to provide transportation to a local artist who uses a wheelchair. This arrangement allows the artist to maintain her living as a painter of nature scenes. A designated volunteer will work with the college students and the care recipient to develop and maintain a transportation schedule as well as develop back-up procedures for when a student is not able to make a scheduled pick-up or the care recipient must cancel an appointment.

Or consider the case of *Faith in Action* of Othertown. After conducting its own organizational needs assessment, the program has identified the following staff challenges as well as supporting roles for volunteers:

- The staff is stretched. They will ask volunteers to help support the staff with administrative tasks such as mailings, data entry, etc.
- Fund-raising revenue needs to increase. They will ask volunteers to develop marketing materials, make presentations, work on special events or help cultivate individual or corporate donors.
- One of their strategic goals is to serve more people. They will ask volunteers to help the agency stay open for longer hours by working the reception desk, answering phones and helping with volunteer training and coalition meetings that are held after regular work hours.

Different ways of identifying volunteer roles may emerge organically as the volunteer program grows and staff and volunteers become used to being involved in the process. Volunteer coordinators often find that staff or other volunteers specifically request that a new volunteer position be created to handle a particular task. You can facilitate this process by creating a volunteer assistance request form. A sample form is provided as Appendix 2F.

Volunteer Interests and Motivations

In order to get the best possible match between identified volunteer roles and community and congregation volunteers, it is important to understand the different volunteer personalities that exist in any pool of volunteers. It is also important to understand that changing trends in volunteering can affect the program's ability to recruit and retain any group of volunteers. Using knowledge about volunteer motivation and trends in the community, you can craft volunteer positions and position descriptions that attract a diverse group of volunteers.

As noted in Chapter 1, volunteers can be identified as different personality types: the Achiever, the Affiliator and the Empowerer.

- The Achiever is motivated by tangible accomplishments, likes to see results and responds to clear measures of the output of volunteer effort.
- The Affiliator is motivated by social interaction, likes to be with people and finds that belonging to a group is important.
- The Empowerer likes to influence decisions and is motivated by status and position, enjoys debate, likes to be with important people and likes being in charge.

For *Faith in Action* programs, the call to service is a significant additional motivation. Volunteers within the program are drawn to providing caregiving tasks and developing long-term relationships with those in need as a way to fulfill their spiritual calling and express their faith.

When developing volunteer position descriptions for *Faith in Action* programs, it is important to emphasize not only the tangible accomplishments that the position will achieve, but also the ways in which the volunteer position meets the deeper spiritual needs of both the volunteer and the care recipient.

TIPS

Designing Positions to Attract Volunteers

Design positions that attract long-term volunteers by emphasizing features and benefits sought by Achievers and Affiliators, who most often favor long-term volunteer opportunities.

- Building skills
- Increasing level of responsibility

• Helping to fulfill the organization's mission
• Developing affiliation with the program

Need short-term volunteers, instead? Short-term volunteers can exhibit any of the traits of the three personalities, but they do share some needs in common. Short-term volunteers have limited time and are most effective when they can learn one (or a few) tasks well. Design volunteer positions that attract these task specialists by emphasizing the following:

• A well-designed position of limited duration
• Tasks that have clear outcomes
• Clear expectations to be met by the volunteer
• Links between the volunteer task and the mission of the program
• The commitment expected from the volunteer

TIME SAVER

Piloting New Volunteer Positions

Let a long-time volunteer be the "test pilot" for a new volunteer position. The volunteer can fill the new position for a couple of weeks and offer feedback. Such an assignment can spice up their usual work, validate their benefit to the program and help the program retain a valued volunteer. This process may also decrease the time associated with breaking in a new position, eliminate frustration for a new volunteer and save the volunteer coordinator valuable time.

Creating Position Descriptions

Volunteer position descriptions are a vital step in program planning and volunteer management. Making use of this one tool can bring about significant gains in effectiveness and efficiency in critical areas of the volunteer program: recruiting, screening, training and supervising. All your preliminary work comes together and culminates in writing the position description.

You can follow a simple five-step process to convert program needs into volunteer positions:

1. Divide the organization into functional areas.
2. Focus on one functional area at a time.
3. Determine the kinds of work volunteers can do within the functional area.
4. Review the list of tasks with the help of paid staff, volunteers and coalition members.
5. Group related tasks together to form the basis for creating a position description.

Each of the group headings identified in the last step will then be the basis for a different volunteer position description. For a worksheet to help you follow this five-step process, see Appendix 2G at the end of this chapter.

TIPS

Target Community Needs

Positions that are targeted to address real community needs will resonate better with volunteers. Draw volunteers to the program by ensuring that positions clearly fill a community need as well as the needs of care recipients. You'll want to keep abreast of changes in the needs of the community and of care recipients. When gathering information about community needs, remember to involve care recipients, local residents, staff, the board of directors or advisory council, faith groups and other volunteers.

If volunteers are going to work in conjunction with paid staff, it is important that the staff agree on the purpose and worth of the volunteer's role as well as the tasks associated with it. Other volunteers may also have key roles in the program and should be included when developing or refining new or existing positions. Involving both staff and volunteers in developing realistic volunteer position descriptions can alleviate some of their concerns. Their input will minimize the possibility of creating volunteer tasks that can be viewed as undermining paid staff responsibilities and maximize the likelihood of creating volunteer positions that actually support the work of paid staff. One method of assessing staff and volunteer concerns is to conduct an informal survey.

SAMPLE

Questions for Staff and Volunteers

- Are there jobs that volunteers should not be doing? Why?
- Are there program elements such as additional staff training that should be instituted before volunteers are brought in?
- Are there training requirements for certain jobs that volunteers will have to meet?
- Are there potential difficulties that should be addressed, such as organizational liability, quality control questions or confidentiality issues?
- Are there worries about the loss of staff or volunteer responsibilities?

Writing Volunteer Position Descriptions

Volunteer position descriptions should emphasize both the features (the elements involved) and the rewards (the positive impact or benefits for the volunteer or care recipient). Thus, writing these descriptions means spelling out the rewards and features of a volunteer position to the potential volunteer, providing clarity about the purpose and impact of the position and setting out how expectations will be met. Writing position descriptions that appeal to potential volunteers is a skill that can be learned.

There are 11 essential elements to any position description. These elements can be crafted to make the most of the position's features and rewards.

QUICK LIST

User's Guide to Volunteer Position Descriptions

- ❑ Title: Give each volunteer task a title that reflects the responsibilities the volunteer is to fulfill. A title lends importance to the position.
- ❑ Purpose or objective of position: Explain the goal of the services to be performed.
- ❑ Responsibilities and/or tasks to be performed: List each duty and responsibility as specifically as possible.
- ❑ Qualifications: Indicate knowledge and skills needed, physical requirements and required level of experience and education if applicable.
- ❑ Rewards: List the rewards for volunteers, such as developing caring relationships, building new skills, working with a group, learning about a new population, gaining satisfaction from giving back to the community, putting faith into action and nurturing faith through service.
- ❑ Time needed: State the minimum number of hours, days or weeks, and include any required meetings and supervisory conferences. Note the minimum or maximum time commitment expected from the volunteer.
- ❑ Orientation and training requirements: Explain the type of training provided, as well as where, when and how.
- ❑ Location: State where the volunteer task will be performed, such as in care recipient's home or in program office.
- ❑ Supervision: Give the name, title, and contact information of the person who will supervise the volunteer.
- ❑ Evaluation: Explain the basis on which the volunteer's work will be evaluated, such as a satisfaction survey will be provided to the care recipient and the volunteer.
- ❑ Date: Note when the position description was last updated and by whom.

Do not forget to consider the following when drafting a volunteer position description:

- Remember the intent of the position description and feature the descriptive elements of the volunteering, such as when, where, doing what, with whom, etc.
- Consider underutilized volunteers in the community or congregations who might be ripe for the position being created.
- Consider the rewards and features that would be attractive to different volunteer personalities and groups when creating a volunteer position description.
- Consider expanding volunteer roles to include manageable short-term tasks to attract episodic volunteers. This introduces volunteers to the mission of the program and may lead to an increase in committed long-term volunteers.

- Consider grouping tasks into team efforts and tailor the list of benefits to attract volunteers from the corporate/business world, families or student groups.

For sample position descriptions, see Appendices 2H and 7B.

TIPS

Volunteer Teams

Consider offering volunteers the opportunity to serve in teams. According to the study on *Faith in Action* program sustainability conducted by Public/Private Ventures, programs that offered team matching as an option in their volunteer programs were more likely to recruit needed volunteers. This strategy may appeal to a larger number of potential volunteers because it offers a social connection and shared responsibility rather than having full personal responsibility for the care recipient. Almost half of *Faith in Action* programs who completed the survey offered team matching for volunteers.

TIME SAVER

Creating Flyers

By including each of these components in the position description, a volunteer coordinator leverages a precious resource—time. The 11 components of a volunteer position description can be used again when creating flyers about the position or when developing interview questions.

For new *Faith in Action* programs, it may be most useful to create a generic volunteer position description in the beginning. As the new program matures, coordinators may want to consider developing more specific position descriptions. When writing the position description, volunteer coordinators can craft a powerful message by focusing on the rewards first, simplifying the features into a brief list and making the message attractive to the intended audience.

TIPS

View the Volunteer Position from the Perspective of the Volunteer

- Will the position directly meet a need within the community?
- Are rewards displayed prominently within the position description in order to enhance its attractiveness?
- What aspects of the position will most appeal to the volunteer pool (family, working, student, senior, etc.) you are trying to reach?
- Does the position offer a way to fulfill a call to service for volunteers from faith groups?
- Is the position meant to utilize the particular skills of an experienced or professional volunteer?
- Is the position targeted to potential long-term volunteers or episodic volunteers?
- Does the position ask for multiple volunteers with varying levels of experience?

- Does the organization offer support through initial and ongoing training opportunities?
- Will the position clearly support the work of the staff of the organization?

The following volunteer position description would appeal to people who have limited time available and want to help provide one-on-one support to a neighbor in need. The position offers an opportunity to provide a concrete, direct service with clearly defined time expectations, and the description focuses on these benefits.

When reading the position description, consider other rewards of this position that might appeal to different volunteer populations.

SAMPLE

Sample Position Description

Faith in Action Outreach Services

1) Position Title	*Faith in Action* Medical Driver
2) Purpose	Ensure access to medical care appointments for elderly residents, as well as their safety and well-being in transit.
3) Tasks/Location	Drive seniors to and from appointments as needed.
4) Hours and times	Based on volunteer's availability. Lunchtime placements available. Most assignments are completed in 1-2 hours and may be scheduled for long-term matches or episodic volunteers as needed.
5) Qualifications	Access to automobile with insurance. Clean driving record and background check required.
6) Rewards	Build friendly relationships with local elderly residents. Provide a much-needed service. Put your faith into action.
7) Supervisor	*Faith in Action* Program Director (123) 555-1234
8) Evaluation	Must maintain clean driving record for duration of volunteering and must honor schedule. Volunteer satisfaction survey required after 90 days.
9) Training	Two-hour training required with optional monthly training opportunities. Optional CPR/First Aid course available free of charge.
10) Draft date	12/01/03

When you have completed your drafts of possible volunteer positions, ask current volunteers to review them and provide feedback based on their experiences. Then put all volunteer position descriptions side-by-side and review them as a whole to see where there may be an overlap or gap in service. Finally, ask yourself again whether or not the duties described for each position will help you to meet your program's high priority goals.

Using Position Descriptions to Screen Volunteers

The volunteer screening process is strengthened by well-written volunteer position descriptions. Early in the volunteer recruitment process, volunteers can use position descriptions to self-screen by applying only for those positions for which they have the skills and interest.

A position description can also be a useful tool in the volunteer interview process. Volunteer coordinators can easily prepare interview questions for each volunteer position once they have explored the needs of the program and outlined the major skills needed for each volunteer position. Having a ready list of interview questions for each volunteer position simplifies future interviews.

During the interview, a volunteer coordinator will look for the applicant's:

- Interests- for example, wants to work in a team and provide respite
- Constraints, when relevant- for example, only available on weekends
- Working style- for example, relative to supervisor, other staff and other volunteers
- Expectations- for example, wants a long-term placement

When looking at this list, observe how the position description actually helps in the interview process. Before a volunteer even walks into the office, a well-written position description will have explained requirements which would help volunteers self-select, explained both supervision and evaluation requirements and shaped volunteers' expectations in terms of the purpose and rewards of the volunteer positions.

TIPS

Make a List of Interview Questions

Create a list of interview questions for each volunteer position and keep them on file with a copy of the position description. When it is time to conduct an interview, share the position description and list of interview questions with the person who will conduct the interview. Using standardized interview questions will bring consistency to your screening process and simplify preparations for the interview.

Using Position Descriptions for Recruitment

The time invested in crafting solid position descriptions will pay off in dividends when it comes time to recruit. Volunteer position descriptions are useful in recruiting volunteers—they serve as the basis for identifying potential pools of volunteers, developing recruitment messages and determining channels for delivering those messages. Independent Sector's 1998 survey of giving and volunteering indicated that the second most important factor in determining whether or not to volunteer is clearly defined responsibilities. (The most important factor? Being asked to volunteer.) For more information on recruiting volunteers, see Chapter 4.

TIPS

Create a Menu

Use volunteer position descriptions to create a menu of volunteer opportunities that can be used for recruitment events, volunteer orientations and individuals who express interest in volunteering. Compile the title and purpose of every available position and list them all in one document. Keep this document handy and provide copies to prospective volunteers to inform them of volunteer opportunities. Update the list frequently and place it on your program's Web site or in a monthly newsletter. If certain positions are filled, keep them on the list, but add a notation that says "not recruiting at this time," to let prospective volunteers know that the position exists and that they may be able to volunteer in that capacity at a later time.

Recruiting volunteers means thinking strategically about the program's needs and the potential pool of volunteers available in the community. In order to avoid marketing to the same volunteers as every other organization and to obtain a reliable and growing source of volunteers, it makes sense to reach out to underutilized volunteers. Volunteer coordinators can increase their chances of recruiting good volunteers by ensuring that position descriptions are designed to attract these underutilized volunteers. (See Chapter 1 for more on trends in volunteering.)

The sample below translates a position description into a flyer that will attract underutilized volunteers. It emphasizes the rewards first and then fills in details about the features. The rewards emphasized here may appeal to someone with limited time, such as a student or corporate employee—two groups of underutilized volunteers.

SAMPLE

Want to make a new friend? Put your faith into action? Make a real difference to someone in need?

Become a *Faith in Action* Medical Driver for the *Faith in Action* Outreach Services. Take our seniors to medical appointments during the morning and early afternoon.

All you have to do is drive.

The only requirements:

- Availability for no more than seven hours a week from 7 A.M. to 2 P.M.
- Driver's license, a clean driving record, insurance, a car that can seat at least three passengers and a willingness to help others.

Please call the *Faith in Action* Program Coordinator at (222) 555-3212 for more information. Office hours are 8:00 a.m. – 4:00 p.m., Monday through Thursday.

Using Position Descriptions to Develop Appropriate Training

Developing a training and orientation regimen for volunteers is simplified when the volunteer positions descriptions have already gone through a careful process. Volunteer position descriptions can outline tasks and clarify the skills needed to fulfill that task. Use the list of tasks to generate learning objectives for the volunteer training session and then build the training from these learning objectives. Using existing volunteer position descriptions as a guide, take a look at the organization's current training program and decide whether or not other learning objectives need to be added.

TIME SAVER

Look for Training Overlap

Review the learning objectives of several volunteer position descriptions at once. Most likely, several positions will have overlapping learning objectives. You can create a group training that can be useful to more than one position.

Most *Faith in Action* programs use basic training that applies to everyone and provide further training for more complex positions or situations, as needed. For example, it may be necessary to develop training that brings staff and volunteers together to work as a team if they are involved in a shared responsibility. Or it may be necessary to create a volunteer training that includes more information about risk mitigation and prevention when working with care recipients. To ease planning and volunteer placement, create a chart of basic and advanced skill or training needs for each position, as well as other special program needs. For more on volunteer training, see Chapter 6.

Using Position Descriptions to Supervise Volunteers

When position descriptions clarify the volunteer's responsibilities to everyone, it simplifies supervision and clears away many areas of potential conflict. By including a clearly stated purpose, identifying the volunteer's supervisor and listing tasks associated with the position, volunteer position descriptions allow supervisors and volunteer coordinators to put their energies into supporting volunteer efforts rather than acting as taskmasters.

The list of learning objectives created for the training program can also be leveraged as a tool for periodic volunteer performance appraisals. Volunteer coordinators can use the list to review the list of duties with the volunteer, note successes and shortfalls and devise together an action plan to further develop the volunteer's skills.

Reviewing and Updating Volunteer Positions

Once the volunteer applicant's strengths, expectations, constraints and interests are determined, it's often advisable to go back and tailor the position description to the new volunteer. This will help get the most out of the volunteer and will help prevent organizational and performance problems.

It's important that volunteer coordinators do not develop or revise volunteer positions in a vacuum. Volunteer positions and the associated tasks should be reviewed periodically by the staff and volunteers who work most closely with them. After this review, position descriptions can be revised to fit new realities.

Volunteers themselves can be good reviewers of current volunteer positions. During interviews with incoming volunteers or performance reviews of existing volunteers, volunteer coordinators can assess the state of the volunteer market. They may find volunteers are not able to walk into a position with all the skills needed to fulfill the identified tasks. During interviews or performance reviews, volunteers may also highlight rewards related to the position that the designers did not spot. This new information can be taken into consideration when revising volunteer positions.

BUILDING ORGANIZATIONAL SUPPORT

Engaging Staff

In organizations with paid staff, a volunteer coordinator can begin the process of creating volunteer jobs by gaining staff involvement. Volunteers are best utilized with supervision and support, and volunteer coordinators need to consult with staff when developing volunteer jobs. Some *Faith in Action* programs have more than one staff member working directly with volunteers, while others structure their program with one paid staff and multiple office volunteers and faith group liaisons.

Engaging Your Board of Directors/Advisory Committee

For a number of reasons, the board of directors or advisory committee can and should be instrumental in the success of the volunteer program:

- Volunteers are a valuable resource for interfaith organizations. Volunteers do not "save" money, but involving them effectively can expand the impact of the program beyond the constraints of the budget.

- It is possible and desirable to take a proactive stance in volunteer program planning. Volunteers can help the program and community in many ways. Their impact is limited only by the leadership's vision.
- Volunteers are influential agents in their own faith groups. Volunteers have credibility in the community because they are perceived as contributing to the greater good through their service commitments. They therefore can play key roles in public relations, fund raising, public education, volunteer recruitment and other community outreach functions.
- Volunteers are a source of valuable information for planning and evaluation. Volunteers are "insider/outsiders"—that is, they are knowledgeable, have a unique perspective and may have access to care recipient's opinions in a different way than paid staff.
- Volunteers are "unsalaried personnel." The board is responsible for creating policies that affect paid personnel, such as new project areas that require funding, major personnel policies, affirmative action statements and ethical considerations. It is important to remember that volunteer staff can benefit from these same types of guidelines.
- Because volunteers are agents of the organization, their work involves potential risk management issues and insurance needs. Anyone acting on behalf of an organization can put others at risk or can be at risk. Volunteers are not inherently more or less likely to have accidents or make mistakes. The board should ensure that the organization has taken all necessary steps to protect care recipients, volunteers and the organization.

Engaging Your Coalition

Engaging your coalition allows your program to do the following:

- Supplement and enhance the friendly visitor role of the minister, rabbi or other religious leader for people in the congregation and community with long-term illnesses.
- Help faith groups fulfill their call to service (mission, mitzvah or other spiritual teaching).
- Provide support to congregation members who are primary caregivers for people with long-term health concerns.
- Connect the house of worship to the entire parish or larger community through outreach services.

CREATING A VOLUNTEER ADVISORY COMMITTEE

Another model for volunteer program development and an excellent use of volunteers is an advisory committee organized specifically to benefit the volunteer program. The volunteer advisory committee supports the volunteer program and provides input and advice. In contrast to the program advisory board, this committee focuses specifically on the needs and interests of volunteers. It may be a subcommittee of your board of directors, advisory board or a completely separate group.

A volunteer advisory committee can be implemented at any time. Even programs that have been operating for five or more years may find that this strategy can help take their existing volunteer program to a new level.

Recommendation

The position description for volunteer advisory committee members should clarify that policies about the volunteer program are subject to approval by the organization's board of directors. Advisory committee members should understand that they are not there to direct but to advise and assist staff and volunteers.

In creating a volunteer advisory committee, the first step is to define its mission and purpose. Some typical responsibilities of an advisory committee include giving input and advice to the volunteer program, providing outreach and community representation or assisting with specific tasks such as fund raising. Based on the program's needs and the committee's mission, create a job description for volunteer advisory committee members.

EXAMPLE

What Will Volunteer Advisory Committee Members Do?

Here are some ways that the advisory committee can assist and advise volunteer coordinators:

- Evaluate the effectiveness of the volunteer program.
- Comment on significant program issues and suggest possible solutions.
- Recognize and reward volunteers for their contribution to the organization.
- Explore volunteer initiatives that enhance the ability of the organization to fulfill its mission.
- Use personal networks, where possible, to help recruit volunteers.
- Serve as liaisons between the public and the volunteer program.

- Suggest collaborative efforts that help the community and heighten awareness of the importance of volunteerism.
- Recommend changes in volunteer management policies to the board of directors.

The mission and purpose of the advisory committee will also help to determine its composition and operations. Representatives from the board, staff, volunteer leaders and coalition members can all have a place on this committee. Recruit a mix of volunteers who have time to devote to accomplishing the committee's goals:

- A board member who supports volunteerism and has a history of community involvement can chair the committee. This board member will report back to the board about the volunteer program and remind them that volunteers are significant to the organization's mission and are as essential to the success of the program as paid staff, fund raising and marketing.
- One or two full or part-time staff members who are enthusiastic about the volunteer program can represent administrative concerns and issues related to volunteer management.
- Two or three volunteer leaders can provide a "front-line" perspective and suggest new approaches.
- Two or three members from faith groups can represent the concerns of the coalition.
- A local volunteer center director can enhance networking and be part of collaborative efforts.

Volunteer Advisory Committee Operations

- Consider a rotating two-year term of office and communicate clear expectations regarding attendance at meetings.
- Meet at least quarterly, or more frequently if needed. Make sure there is a purpose and an agenda for each meeting. If there is not sufficient reason for quarterly meetings, this is a sign it might be time to re-evaluate the mission and job description of the committee.

Finally, consider these other issues regarding advisory committee responsibilities and operations:

- How will the advisory committee work with the board of directors?
- Who is in charge? Who approves name changes, project goals and other public activities that affect the organization's community relations?
- Will volunteer program staff have any direct responsibility for or authority over any aspect of the advisory committee's work? Conversely, does the committee have the right to delegate work to program staff?

- What are the requirements for reporting and evaluation?
- Should the committee chair serve on the board ex officio? If so, are this individual's responsibilities the same as those of any other board member? What is the rationale for this group of volunteers having governance privileges if direct-service volunteers do not?

TRACKING VOLUNTEERS

Another essential element in volunteer program planning is creating or refining a system to track your volunteers. Computers are invaluable for streamlining this process using a volunteer database. This database may contain the names and addresses of volunteers, their assignments, hours of service, awards and other vital information. Organizations can create their own database by adapting such widely used software programs as Microsoft Access, Filemaker Pro or Lotus Approach. To establish and maintain your database system, recruit volunteers who work in information technology (IT) or who are database savvy.

Helpful Websites on Database Development

- http://uk.dir.yahoo.com/Computers_and_Internet/Software/Databases. This is a link to online user groups, Web directories and specific database packages.
- http://www.npinfotech.org. This is an index for "off-the-shelf" software and resources for programs seeking software for volunteer organization operations.

TIPS

Creating and Managing Your Volunteer Database

Adapted from the online newsletter *Volunteer Today*.

Create a Records Advisory Team.
This can be a team of volunteers and board members who use the database or have knowledge about databases.

Create a written process for working with the database.
Written documents with database instructions mean there is less chance for error.

There needs to be a Database King or Queen.
While several people might be keeping the records up-to-date, one person needs to take lead responsibility for the database and report to the program director.

Train, train, train.
Volunteers using the record-keeping database are less likely to make mistakes if they are trained. Volunteers need to attend upgrade training as your tracking system improves.

Limit access.
The only people who can access the database are those with training. It is easy to do this by using the security aspect of the program in the database. The King or Queen of the database should be in charge of access.

Clean up.
Many volunteers serve in more than one capacity and that makes it likely they may appear more than once in the database. There should be a regular system for eliminating duplicates in the records and checking the accuracy of your information.

Stay on top of input.
Keep the database viable by timely input of data. This is an ideal job for teens or college students in computer classes—under the supervision of the Database King or Queen. A database is only useful if you update it regularly. This is a place where details count for a lot. Keeping up makes a difference in how you are viewed by volunteers. Think of your database as the foundation of all your communication.

Make a maintenance schedule.
Most database systems have ways to identify problems. Establish a check-up system.

Think disaster.
Organize a disaster plan. Back up records once per month in an off-site location—get the software vendor for your program to make some suggestions and/or involve the technology savvy volunteers in this planning.

*Adapted from http://www.volunteertoday.com/May02managesuper.html

BUDGETING FOR THE VOLUNTEER PROGRAM

Budget

Expenses

Normal program expenses usually include the following:

- Salary
- Benefits
- Office supplies
- Equipment
- Printing
- Postage
- Phone
- Travel to national conference and state meetings

Make note of other potential expense categories as well:

- Recruitment, recognition and training costs (such as food, recognition items, recruitment posters and other recruitment materials, training materials, travel expenses for volunteer manager to attend professional development training, etc.)
- Volunteer insurance and background checks
- Expense reimbursement for volunteers and participants (such as travel expenses—these are optional reimbursements, but may affect who can participate as volunteers in your programs)
- Space for the staff
- Any special space and equipment needed for volunteers to carry out their jobs

Also consider your staffing needs and how this may affect your budget:

- Volunteer coordinator: Person responsible for coordinating, recruiting and supervising volunteers. This person can be full-time or part-time, depending on the local program's needs and resources.
- Staff and current volunteers: To help plan for, work with and support volunteers.
- Management: To support by overseeing and ensuring the success of the program (may include the board and advisory committee).

Income

Where do your volunteer program funds come from? Does funding come mainly from direct individual donations, coalition support, grants or in-kind contributions? Knowing where your income comes from and when it is likely to arrive will help the volunteer program plan out its service year.

Potential Sources of Income

There are two main types of revenue streams your volunteer program will encounter: restricted funding and unrestricted funding. A third type of support to your program may also come as in-kind donations.

Restricted funds are given to a program by an outside donor or sponsor who places specific restrictions on the use of the funds. The volunteer program has an obligation to the donor or grantor to use the funds in the manner specified and to be able to report, if requested, on categories and amounts of expense that support the intent of the fund. One item that often is left out of restricted funding dollars is general operating costs. Sources of restricted funding could include:

- donations from individual donors for specific programs or projects
- restricted endowment income
- government grants and contracts
- private grants and contracts
- fund-raising campaigns or events that clarify a specific use for the donations

Unrestricted funds may be given to a program by an outside donor or sponsor or they can be raised through fundraising events. They are funds for which no particular program or use has been specified. These funds can be used to pay for general operating costs, buying needed equipment, funding programs, training, etc. They may be used to fund existing programs and needs or invested to pay for future organizational needs.

Sources of unrestricted funding can include:

- unrestricted endowment grants
- government grants
- fund-raising events or campaigns
- unrestricted foundation grants
- donations by individual donors

In-kind gifts can come in many forms. They may be donations of services by professionals such as graphic designers or lawyers who take on a project free-of-charge or may be donations of goods such as office supplies or food products.

For a worksheet to help you build a volunteer program budget, see Appendix 2J at the end of this chapter.

Appendix 2A

Worksheet: Writing a Purpose Statement

An Example

Directions: A purpose statement grows out of discussion. The volunteer advisory committee should participate in determining the purpose of the volunteer program. If you do not have an advisory committee, gather experienced and new volunteers together to answer the questions on this form and then write a draft statement. The draft will need to be approved by the administrators of your *Faith in Action* program.

1. Write the mission statement of your organization here.

    The purpose of *Faith in Action* Respite Connection is to coordinate respite services for primary caregivers of children with disabilities and friendly visiting services to children, through the efforts of volunteers of many different faiths.

2. In general, what are the needs the volunteer program exists to fill?

    Respite care to family caregivers
    Comfort and companionship to children with disabilities

3. Who are the key stakeholders in the volunteer program?

    Family members
    Children with disability

4. Using the information here, draft a purpose statement for the volunteer program.

    The purpose of the volunteer program of *Faith in Action* Respite Connection is to provide respite services for primary caregivers of children with disabilities and provide comfort and companionship through friendly visiting with the children.

Your Purpose Statement

1. Write the mission statement of your organization here.

2. In general, what are the needs the volunteer program exists to fill?

3. Who are the key stakeholders in the volunteer program?

4. Using the information here, draft a purpose statement for the volunteer program.

Appendix 2B

Key Points for Conducting a Needs Assessment

Who has a stake in starting or strengthening our volunteer program?

- Staff
- Coalition members
- Current volunteers
- Care recipients
- Community organizations
- Families of care recipients
- Advisory groups
- Potential volunteers

How can we determine our volunteer needs?

- Interviews
- Tests
- Questionnaires
- Task forces
- An analysis of existing materials and information (content analysis)
- SWOT analysis (strength, weaknesses, opportunities, threats)

What do we do when we have compiled the results?

- Make a list of the benefits that can be created for *Faith in Action*, its mission and the people it serves by involving volunteers in specific ways.
- Make sure the results are shared with those who can help build or rebuild the volunteer program.
- Use the information to guide the planning process to create or improve the volunteer program.

Appendix 2C

Types of Needs Assessments

	SWOT PROFILE	INTERVIEWS	SURVEYS	TESTS
Advantages	(SWOT - Strengths, Weaknesses, Opportunities, Threats) *Can be done quickly *Can be done by a small number of people *Affords the opportunity to express opinions and suggestions *Can collect both quantitative and qualitative information	*Reveal feelings, causes and solutions to problems *Draw out facts *Afford the opportunity to express opinions and suggestions *Allow follow-up questions	*Can sample a large number of people *Give an opportunity to express an opinion confidentially *Can easily summarize and quantify data	*Serve as a diagnostic tool *Help to select exactly the target of a program *Can easily compare and report results
Disadvantages	*Not an in-depth assessment *May only be gathering the opinions of those inside the organization *May be hard to quantify some answers	*Can be time-consuming *Can only use small sampling of people *May have some answers that are difficult to quantify *Require pilot test and revision of questions *Interviewers must be trained to listen and avoid judging responses	*Impede open expression of opinions *Are generally costly *Take time to construct *Require a professional to design unbiased questions *Must insure anonymity to respondents *Require pilot test to ensure appropriate responses to the questions asked	*Can be difficult to obtain a valid standardized test for the assessed situation *Give clues to a situation, but do not always describe causes or solutions *Need an expert to select appropriate instrument and administer

	TASK FORCES	CONTENT ANALYSIS	FREE ASSISTANCE
Advantages	*Reveal causes and solutions *Give sample opportunity to express opinions *Permit and encourage the synthesis of different points of view *Promote understanding *Build support for the program *Increase a sense of ownership by those involved *Provide a learning opportunity for the participants	*Uses existing reports and materials *Can be accomplished by one person *Costs less, because data has already been collected *Provides objective evidence of the problems *Can be easily understood by decision-makers *Is effective when used in combination with other techniques *Can use the local United Way statistical report on volunteerism or other standardized reports	Help in preparing, conducting and analyzing needs assessments is available in most communities. Here are some suggestions for places to go for assistance: • Check with the local United Way for forms or methods. • Community colleges have classes that might conduct assessments. Check with professors who teach sociology, social work or computer classes. • Graduate students generally are looking for research projects. • Some large companies have marketing departments that regularly engage in needs assessment research. They might have an employee willing to assist in this process.
Disadvantages	*Can be time-consuming *Can be difficult to get those with authority to influence decisions to attend meetings *Can be difficult to quantify results *Do not lead to quick results *Need to have the authority to make decisions and recommendations *May represent only one opinion	*May not contain the most current information on the situation *May not provide specific information on the situation being reviewed	

Appendix 2D

Worksheet: Identifying Needs for Volunteers

Step 1:
Divide the program into its various functional areas or programs. Write the functional areas of the project below:
A)
B)
C)
D)

Step 2:
Next, focus on just one of the functional areas you identified. Be sure to involve staff members and current and former volunteers in determining needs in that area. Write the names and/or positions of people to interview:

Step 3:
Determine the kinds of work that volunteers can do within this functional area, using input from the people listed above. List each task separately and be as specific as possible. It is helpful to begin each task with a verb (the action) and follow with nouns (the what). Write everything that comes to mind; you can refine them later.

List all the tasks for the functional area selected.

Step 4:
Show the list to others to identify gaps. Review the list of tasks and delete any that are inappropriate for volunteers.

Step 5:
Group related tasks to form the basis of a position description. Keep in mind that a volunteer can not be in two places at once. Also, many volunteers like some variety in the work they do.

Review the list of tasks and mark related tasks with the same letter. Below, write a name for each of the groups next to the corresponding letter. Each of these group headings will be the basis for a different volunteer position description.
A)
B)
C)
D)

Appendix 2E

Sample: Identifying Needs for Volunteers

Organization: *Faith in Action*

Step 1:
Functional Areas:
A) Transportation
B) Friendly visits
C) Shopping

Step 2:
Interview:
Bill Matter, Advisory Council/Board of Directors
Jennie Must, Department of Highways Sergeant
Leonard Best, volunteer coordinator
Chuck Mark and Jessica Door, insurance agents
Annie Money, development staff
Bob Donor, Avis Rent-A-Car, a key funder
Steve Carr, volunteer driver
Addie Counts, accounting staff
Barton Moore, care recipient

Step 3:
Volunteer Tasks By Functional Area:
Transportation: Van servicing (purchasing maintenance supplies such as oil and antifreeze, changing oil, cleaning the van)
Friendly visits: Appointment scheduling
Shopping: Driving

Function: Van Servicing
Volunteers could purchase and pick-up maintenance supplies, do routine maintenance such as changing oil, clean the vans at the end of the day.

Step 4:
Upon review, we will not have volunteers do the actual under-car maintenance because the county requires that those who service non-personal-use vehicles be licensed.

Step 5:
Volunteers who work in van servicing will be expected to keep the van clean and keep supplies for servicing the van stocked.

Appendix 2F

Volunteer Assistance Request Form

Date of Request: Staff/Volunteer Contact:

Purpose of work to be done:

List of Tasks:

Qualifications Sought:

Location: How Often:

Hours/Week: Commitment Length:

Flexible to volunteer availability: YES/NO Needed Time:

When the position starts:

Number of volunteers needed:

Return form to:

Name:

Address:

Appendix 2G

Worksheet: Volunteer Position Description

Title/Position:

Purpose of Position:

Sample Tasks/Responsibilities:

Qualifications sought:

Benefits:

Timeframe:

Length of commitment:

Estimated hours/month:

Scheduling: ☐ at discretion of volunteer
☐ at specified times:

Training required:

Worksite:

Supervised by:

Name:

Title:

Phone:

Drafted by:

Date:

Appendix 2H

Sample: Volunteer Position Description

Faith in Action VOLUNTEER CAREGIVERS PROGRAM
POSITION DESCRIPTION – CONGREGATIONAL COORDINATOR

Position Title: Congregational Coordinator

Department: *Faith in Action* Volunteer Program

Position Reports to: *Faith in Action* Program Director

Position Summary (The major purpose for this position): The purpose of the Congregational Coordinator is to provide:

- Responsibility for and management of the caregivers program in a specific congregation.
- A contact person between the congregation and the *Faith in Action* Volunteer Program office.

Essential Responsibilities (Those that define the major aspects of the position and help to determine the degree of success of performance):

The Congregational Coordinator will:

- Be the person designated by the Pastor, Rabbi, Priest or other congregational leader to be responsible for implementing the caregivers program in that congregation.
- Act as the contact between the congregation and the *Faith in Action* Volunteer Program office.
- Publicize the program and unmet needs through congregation talks, bulletins, newsletters, posters, group presentations and individual contact.
- Recruit volunteers through congregation talks, bulletins, newsletters, posters, group presentations and individual contact.
- Identify with the assistance of the program director, religious leaders and congregation those people who are in need of assistance.
- Make an initial visit to those persons in need.
- Assess and match those in need with appropriate volunteers.
- Assist program office with support and recognition programs for volunteers.

- Ensure volunteer tracking information is provided to *Faith in Action* Volunteer Program office.
- Maintain a tracking and record system for volunteers and care recipients.
- Attend and participate in monthly coalition members' meeting.

Position Requirements (Specifies the minimum knowledge, skills, abilities and education necessary to execute the key responsibilities):

- Demonstrate good knowledge of the congregation including its history and knowledge and understanding of people in the congregation and its surrounding community.
- Demonstrate an ability to work with other volunteers and coordinators and with people in the community whose circumstances leave them with social, physical or mental needs.
- Demonstrate respect for the individual faiths of our community and the ability to work with representatives from many faiths.
- Demonstrate a clear understanding of the fundamentals of volunteer management or a willingness to learn such fundamentals.

Position Benefits:

Volunteers who work as Congregational Coordinators may receive benefits that include:

- The joy of serving
- The satisfaction of helping those in need through one's faith
- Education and training in volunteer management and caregiving
- Working with other dedicated volunteers
- Recognition from within the religious and secular communities
- Personal and spiritual growth
- A sense of personal worth to self and community
- The opportunity to build a network of friends in the church and community
- Gaining a greater testimony and understanding of the need for volunteer work through faith programs

Worksheet: Building a Volunteer Program Budget

INCOME

Budget Item	*Projected Revenue*
Restricted Funds: • donations from individual donors for specific programs or projects • restricted endowment income • government grants and contracts • private grants and contract • fund-raising campaigns or events	
Unrestricted Funds: • unrestricted endowment income • government grants • fund-raising events or campaigns • unrestricted foundation grants • donations by individual donors or coalition members	
In-Kind Donations: • professional services • office supplies • food items • building supplies or tools • office space	

Expenses

Budget Item	***Projected Expense***
Salaries and Benefits	
Facilities Program specific space	
Telephone	
Printing/Postage	
Supplies • office supplies • program supplies • volunteer support supplies— recognition items, recruitment materials, record keeping, training, etc. • food, refreshments • building supplies and tools	
Equipment • volunteer program equipment (computer, copier, fax, etc.), • program equipment	
Events • recognition events, food, decorations, entertainment, etc. • program events	
Training • staff • volunteers	
Travel • staff • volunteers	
Dues/Subscriptions/Insurance • staff • volunteers	
Volunteer Reimbursements • out-of-pocket expenses	

Volunteer Program Risk Management

3

OVERVIEW

The purpose of risk management is to minimize risk to the organization and everyone associated with it—volunteers, coalition members, care recipients, staff, board and advisory committee members. If done correctly, risk management will be integrated into every aspect of your *Faith in Action* volunteer program. Because it is not an isolated aspect of volunteer management, risk management is discussed in some detail in this chapter but appears in other chapters as well.

The key element in managing risk is managing volunteers well, so it enters into each step of volunteer placement and management: screening, selecting, placing, training, supervising and monitoring volunteers. For example, one way to minimize risk is to incorporate screening techniques throughout the volunteer placement process—from creating position descriptions to providing training opportunities to instituting supervisory guidelines.

This chapter covers the six essential areas to consider when developing a risk management plan:

- Volunteer program risks
- Volunteer position risk analysis
- The screening process
- Risk management policies and guidelines
- Risk management in special cases
- The crisis management plan

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THE IMPORTANCE OF VOLUNTEER PROGRAM RISK MANAGEMENT

Volunteer programs are inherently risk-taking ventures. Such programs risk resources and energy in trying to solve our communities' most intractable problems—long-term illness, loneliness and inequity. These are definitely risks worth taking.

Yet volunteer programs also take other risks, in that they are responsible in many ways for the safety, security and welfare of care recipients, staff, volunteers and the program itself. Programs may be liable for the actions of their staff and volunteers. Finally, organizations are responsible for the fair treatment of volunteers as unpaid employees. Taking steps to minimize potential damage and difficult situations arising from these risks is what is known as risk management.

For *Faith in Action*, effective risk management means that precious personal and financial resources are focused on providing quality services rather than handling lawsuits. And there is another important reason for integrating risk management strategies into volunteer programs. Everyone wants to work in a "safe" place, where they not only can feel physically safe, but where they also will not be made to feel out of place or over their heads. Volunteers, staff, board members and care recipients all need to know that their needs and security are important to the volunteer program.

For all of these reasons, a thoughtful, effective approach to risk management is not only smart but also reassuring.

VOLUNTEER PROGRAM RISKS

There are three basic areas of liability associated with volunteer programs: the liability of individual volunteers, the liability of the volunteer program to its volunteers and the liability a volunteer program may face based upon the actions and behavior of its volunteers.

Volunteer Liability

Volunteers are potentially liable for the consequences of their actions. Although volunteer protection laws exist in all 50 states, volunteers can still encounter legal problems in three areas: criminal liability, civil liability and failing to live up to obligations to the organization. Volunteer protection statutes simply raise the bar on proving liability; they do not eliminate the risk completely.

- To be criminally liable, a volunteer would have to violate a state or federal law by committing a crime such as theft, assault, or client abuse. In some states, criminal liability can also extend to less obvious violations, such as failure to report elder abuse. (See the box on local regulations included in this chapter.)
- A volunteer can be held civilly liable for injuries caused to care recipients, either intentionally or through negligence. Injuries can be physical, financial or psychological.
- To be held liable for failing to live up to his or her obligation to an organization (also called a breach of obligation), the volunteer must violate some agreed upon performance rule such as client confidentiality.

The Volunteer Protection Act of 1997

The Volunteer Protection Act of 1997 (S.543) provides immunity for volunteers who serve in nonprofits or government for harm caused by an action or omission. This immunity is based on certain conditions:

- The volunteer was acting within the scope of his or her responsibilities at the time.
- The volunteer was properly licensed, certified or authorized to act.
- The harm was not caused by willful, criminal or reckless misconduct, gross negligence or conscious and flagrant indifference to the rights or safety of the harmed individual.
- The harm was not caused by the volunteer operating a motor vehicle, vessel or aircraft without a state-mandated operator's license or insurance policy.
- The Act does not affect the "liability of any nonprofit or governmental entity with respect to harm caused to any person," nor does it preclude a nonprofit taking civil action against any volunteer. For more information, see U.S. Public Law No. 105-19.

Every state has some form of volunteer protection laws, although these differ from state to state. However, despite the federal act or state protection laws, most volunteers remain fully liable for any harm they may cause. The federal act does not prohibit nonprofits from bringing an action (lawsuit or criminal charge) against a volunteer. To find out more about the protection an individual state offers to volunteers, visit the Nonprofit Risk Management Resource Center's Web site at www.nonprofitrisk.org. From this site, you can download at no cost the State Liability Laws for Charitable Organizations and Volunteers.

Organizational Liability

There are two types of organizational risk that should concern *Faith in Action* programs: the liability an organization incurs towards its volunteers and the liability it assumes because of the actions of its volunteers.

Liability Towards Volunteers

Legally, volunteers are considered unpaid employees of an organization; therefore, the organization assumes responsibility for protecting volunteers from harm and enforcing personnel rules.

- Protection from harm means that an organization cannot recklessly endanger its workers. The organization must eliminate work-related risk and danger or alert and prepare workers to deal with any danger.
- Personnel rules require an organization to treat volunteers fairly. This covers hiring, firing and supervisory activities of the volunteer program. *Faith in Action* programs are not allowed to discriminate against classes or types of individuals, such as people with disabilities or older adults, who wish to volunteer. *Faith in Action* is also required to act in ways that uphold the many employee rights and public accommodation laws passed by federal and state legislatures.

Liability for Volunteers' Actions

When acting within the scope of their volunteer duties, volunteers who cause injury to another person can be held liable for their actions. The volunteer program may also be held liable. Because the volunteer was "acting as an agent" of the program, the volunteer's mistakes can become, in effect, the mistakes of the volunteer program.

Volunteers who engage in actions that are outside the scope of their volunteer duties—such as committing fraud, theft or elder abuse—may render the volunteer program vulnerable to legal action. The organization is particularly vulnerable if it can be shown that the volunteer program was guilty of negligence in hiring (a lax screening or application process), training (no opportunity for first aid or CPR training even when required for the job) or supervision (no evaluation process in place). When an organization is negligent, it may be held responsible for failing to prevent volunteers from injuring someone.

These are not the only areas in which a volunteer program may be exposed to liability. In reality, each volunteer program may also be vulnerable to different risks based on the particular services it provides or population it serves. You cannot assume that your program or your volunteers are protected by coalition members' coverage. It's important to talk with a trusted insurance professional about the types of insurance your program needs to cover its specific legal vulnerabilities.

Local Volunteer Regulations

If you have questions about local or state regulations that could affect the level of screening needed for volunteers who work with potentially vulnerable populations (such as children, frail elderly or people with disabilities), here are some options for finding out more about local regulations:

- Visit http://www.eriskcenter.org/resource/downloadablepubs/index.html and download a 118-page booklet on State Liability Laws for Charitable Organizations and Volunteers in all 50 states. Or call the Risk Management Resource Center's collaborative partners for more information. The partners are the Public Risk Management Association (PRIMA) at 703-528-7701, the Nonprofit Risk Management Center (NRMC) at 202-785-3891, and the Public Entity Risk Institute (PERI) at 703-352-1846.
- Check with the local regulatory agencies within your state by conducting keyword searches using agency names.
    - The names of regulatory agencies you will enter as keywords or look for in the phone directory will vary by state. Still, most have similar names—such as Department of Health and Human Services, Department of Aging, Child and Protective Services or Department of Protective and Regulatory Services.
    - Log on to www.firstgov.gov and select your state in the drop down box. This instructs the search engine to look only within the Web sites of your local state agencies. You can also call 1-800-FED-INFO to access a similar search by phone.
    - Look in your local phone directory under the government pages.

VOLUNTEER POSITION RISK ANALYSIS

When developing a risk management strategy, it helps to follow a simple process:

- Develop an overall picture of the environment in which the volunteer program and its volunteers, care recipients, board or advisory committee members, coalition members and staff are operating. What are the laws governing your program's activities? What rules and regulations do you need to comply with? What community organizations do you work with? What are the needs of the care recipients? What are the skills of the volunteers?

- Identify the key activities, programs and services provided by the volunteer program.
- Identify the risks associated with the various activities.
- Evaluate and prioritize the risks, based upon the likelihood of their occurrence and the level of seriousness of the consequences. Some occurrences may be unlikely, but their consequences could be so devastating that they take a higher place on the priority list than more likely but less damaging items. For example, developing a transportation safety plan for volunteer drivers will take higher priority than developing a back-up system for running out of stamps to mail bills.
- Control risks by developing reasonable responses and integrating them into the overall volunteer management process. Reasonable responses might include stopping the risk-taking activity; changing the way the activity is conducted to reduce risk; minimizing harm by developing emergency procedures; or transferring liability for an activity to another party through letters of agreement, insurance policies or waivers of responsibility. For example, a *Faith in Action* program may use a van owned by a congregation and covered by their liability insurance to provide shopping services.
- Periodically review and update risk management strategies. For example, if a risk management activity is to provide training in bill paying, conduct periodic surveys and check-ins with care recipients, bill collectors and volunteers. Are the bills paid on time? Has the number of delinquent payments made by care recipients gone down, up or remained the same since the volunteer's involvement? Do volunteers feel they have all the information they need to make payments in a timely manner?

Conducting a risk analysis does not have to be a complex process. Look at your volunteer program to identify your key activities, programs and services. Then predict unpleasant surprises that could occur in any of these activities. What can your volunteer program do to keep these unpleasant surprises from occurring?

Risk Analysis

Here are some questions to ask when conducting a risk analysis. It is helpful and wise to bring together coalition members, staff, board or advisory committee members, volunteers and funders to explore these concerns.

Questions	**Sample Answers**
What are the key activities of the volunteer position?	Friendly visits each week to care recipient's home
What are your expectations for these activities?	Caring friendships, assistance with light chores, light meal preparation
What are risks that may be associated with these activities?	Volunteer falls while changing light bulbs or gets burned while cooking; volunteer theft or abuse; the care recipient falls
Are there special credentials needed to fulfill any of the volunteer tasks?	*Faith in Action* volunteer training
What types of insurance are needed to cover the volunteer and the volunteer program?	Talk with an insurance agent to determine the risks to your program and what types of insurance are appropriate
What basic skills will be needed by volunteers?	Basic knowledge of informal caregiving principles
What types of screening will be needed to ensure that volunteers match client needs?	Reference checks, application, interview
What types of screening will be needed to ensure that care recipients are right for the program?	Care recipient assessment
Is extra training needed to prepare volunteers, staff, care recipients or administrators to conduct activities?	Basic *Faith in Action* training with optional ongoing training; site visit to the care recipient before being matched with a volunteer
Is the training available in the community? In your volunteer program? Is there accreditation or quality control in place to make sure the training meets the needs of the volunteer and volunteer program?	CPR and first aid training are offered at the local hospital for *Faith in Action* volunteers.
What levels and types of supervision will volunteers, staff and care recipients need to ensure that all activities are being conducted within agreed parameters?	Use the results of your program needs assessments and volunteer position description drafts to help answer this question. Get feedback through volunteer satisfaction surveys and quarterly volunteer meetings.
What kinds of information need to be collected to help supervisors oversee the volunteer and care recipient experience?	Feedback from the volunteer, care recipient and care recipient's family, as well as other service providers who can comment on any changes in the welfare of the care recipient; monthly tracking forms.
What do you do if a volunteer is accused of stealing or causing some injury?	You should already have in place proper insurance and reporting procedures. By integrating risk management procedures into your program, you will already have provided a safety net for your program through proper screening, documentation, training and supervision processes.

You already have on hand several tools you can use as part of the risk management process:

- Volunteer applications
- Volunteer position descriptions
- Background check permission slips
- Interview records
- Volunteer agreements
- Volunteer program policies
- Volunteer references
- Volunteer satisfaction forms
- Care recipient satisfaction form
- Ongoing documentation (assessments, tracking, etc.)

10 Steps to Reduce Risk*

Here is a list of ten common-sense steps a volunteer program can take to reduce risk.

1. Write a clear mission or purpose statement that tells why the organization exists and what it is trying to do.
2. Prepare a job description for every volunteer position.
3. Make sure each volunteer is suited for the position and tasks assigned.
4. Maintain a paper trail and create a personnel file for each volunteer.
5. Make sure each volunteer completes a registration form; check references; and conduct background checks, if needed.
6. Assess volunteer skills and provide training to ensure each task required can be properly handled.
7. Make sure proper supervision and support are available to the volunteer.
8. Investigate all rumors or notice of wrongdoing immediately and fairly. Have complaint and investigation guidelines in place that cover such occurrences. For example, who should a care recipient or volunteer contact if they suspect wrongdoing? Provide copies of the guidelines to everyone associated with the volunteer program. (For a sample crisis management plan, see Appendix 3A.)
9. If there is a problem or complaint, offer immediate help.
10. Try to turn a negative into a positive by acting swiftly and fairly to resolve a problem.

*McMenamin, Robert W. *Volunteers and the Law: A Guidebook.* Beaverton, OR: Jomac Publishing, 1995.

Key areas of risk to look for when analyzing a volunteer program include basic issues of safety, client vulnerability, financial access and organizational exposure.

Safety

What are some of the basic safety issues that staff, volunteers, board or advisory committee members, care recipients or the general public may face? For example, if your *Faith in Action* volunteers will be making minor home repairs, what are the related safety issues? Should you only allow volunteers with health insurance to work on this project? Do paid staff need to be there to supervise? What kinds of carpentry skills are needed? What assurance do you have of the supervisor's expertise? Is there potential for care recipients to be hurt by misplaced building materials? Could members of the general public get hurt by falling debris or nails left on the sidewalk?

Client Vulnerability

Certain populations of people are considered vulnerable because their physical, mental, emotional or legal status can make them more susceptible to abuse or fraud and they may have less ability to protect themselves or report the crime. By focusing services on the frail elderly, children and people with disabilities, *Faith in Action* programs often serve the most vulnerable people in their communities. Vulnerable clients may also include healthy care recipients who place a high level of trust in *Faith in Action* and open their homes to volunteers or provide access to confidential information.

Financial Access

Volunteers may have access to confidential documents held by care recipients (checkbooks, bank books, social security information, credit cards) or access to funds and accounting information related to the volunteer program (petty cash box or nonprofit tax-exempt number). Certainly, this issue is an important one for *Faith in Action* programs with volunteers who help care recipients manage their bills. Volunteers may also expose themselves to risk if they allow the volunteer program access to some of their personal information used to conduct background and credit checks. Their privacy needs to be protected as well.

Organizational Exposure

The areas of vulnerability for a volunteer program generally coincide with key elements of volunteer management: screening, selection, placement, training, supervision and other measures designed to control wrongful or careless actions and minimize risk. Building risk management into these processes strengthens the security of the program and lessens the risk of exposure.

EXERCISE

Quick Risk Analysis

Do a quick risk analysis of *Faith in Action* of Anytown, which matches volunteers with seniors in their homes to provide much-needed services such as bill paying, cleaning, running errands, companionship and meeting other essential needs. Drawing on the explanation of risk factors, list five potential sources of risk for this program:

1.
2.
3.
4.
5.

These are some areas of potential risk you may have identified:

- **Working with frail elderly, children or people with disabilities.** Volunteers who work in people's homes and with vulnerable populations, such as the frail elderly, children or people with disabilities, are usually more carefully screened. Screening methods may include applications, references, interviews and background checks. These volunteers may also require additional training to increase their understanding of appropriate ways to care for and help clients who may be experiencing physical or emotional challenges. Training in CPR, first aid and other emergency care may be required, depending on the level of assistance required by the care recipient.
- **Volunteering in a care recipient's home.** Working in someone's home subjects both the volunteer and the care recipient to extra risk. Almost all *Faith in Action* services are provided in the home, so it would be wise to consider this as a risk for all *Faith in Action* volunteers.
    - Does someone who might be unsafe have access to the care recipient's home?
    - Should the volunteer have an identification badge?
    - Should there be a check-in procedure to make sure the volunteer has gotten to and from the home safely?
    - Will the volunteer be required to do anything that requires additional skills?
    - Has the volunteer been trained? Training the volunteer encourages feelings of safety and confidence.
    - Does the volunteer have a list of contact people to reach in an emergency?
    - Does the volunteer know the procedure for getting help in an emergency?
    - Is the volunteer bonded (insured in case of breakage or theft)? The care recipient may want to know this.

- **Paying bills.** Volunteers who pay bills are going to have access to sensitive information. Have they been thoroughly screened? Have they been through training to learn the program's guidelines and procedures for bill paying?
- **Running errands.** Getting into a motor vehicle always carries risks for the driver, passengers and others on the road. When a volunteer is transporting a care recipient, running errands or otherwise driving on official *Faith in Action* business, the risks are transmitted to the volunteer program.
    - Has the volunteer's driving record been checked for any moving violations or accidents?
    - Is the car in proper running order?
    - Does the volunteer have adequate automobile insurance coverage?
    - Does the volunteer use the organization's vehicle? Who is responsible for vehicle maintenance?
    - What if a volunteer has an accident while running an errand? Whose insurance policy will pay first? Will the volunteer be eligible for workers' compensation?
- **Companionship.** Volunteers and care recipients will be forming a relationship.
    - Are they ready?
    - Has the volunteer received training on *Faith in Action*'s policies related to working with care recipients?
    - Have volunteers been trained to cope with their emotions as their new friends age and become more frail?
    - Do care recipients have an opportunity to offer feedback to a neutral party on the work performed by the volunteer?

THE SCREENING PROCESS

Screening is a key component in placing volunteers successfully within a *Faith in Action* caregiving program. One purpose of screening is to minimize risk to volunteers, care recipients, staff and the organization. Screening can keep volunteers out of positions for which they do not have essential experience and reduce the exposure of care recipients to volunteers who may be incompetent or do harm.

Screening should be incorporated into the entire volunteer placement process—from creating position descriptions to conducting effective interviews to checking references. Of course, while screening can minimize risk, it cannot eliminate it completely. But even basic screening techniques can protect the integrity and quality of your *Faith in Action* program. For example, when placing volunteers in positions of trust that involve working with vulnerable care recipients, such as the frail elderly or people with disabilities, screening ensures that everything possible was done to identify individuals who pose risks. Screening may help to identify individuals who are dangerous, pose an unacceptable risk if placed in certain situations or are unsuited for certain placements.

Through proper screening, it is also possible to enhance volunteer placement and maximize your potential for placing the most appropriate volunteer candidate in the right volunteer position. Screening helps volunteer coordinators find a good fit between the volunteer's skills and interests and the demands of the position. For more information on screening volunteers, see Chapter 5.

Volunteer Registration and Self-Screening

Volunteer registration forms can be used to gather information (e.g., past employment, education level and references) that will be useful in the later steps of the screening process. Gathering key information in the beginning will make it easier to prepare for other parts of the screening process. Information provided on the registration form or through the coalition referral may prompt questions to ask during the volunteer interview. Ask coalition congregations to help in screening volunteer referrals to *Faith in Action*.

Recruiting for a volunteer position does not end when the prospective volunteer enters the office. Volunteers may still be deciding whether or not to sign up for the long term. Part of risk management is facilitating the process of self-screening by volunteers, so that volunteers themselves can decide whether or not they are a match for both the position and the organization. When the organization provides potential volunteers with important information in advance about the position and program, volunteers can assess their own vulnerability for risks as well as their own appropriateness for a position.

Background Checks

Background and personal reference checks can also be important screening strategies. High-risk positions require a high level of screening and may include some combination of a second interview, interviews with family members, home visits and official background checks. When establishing policies and procedures for background checks, your program should consider the sort of background checks that will be conducted for each position and by whom, and whether or not the organization will check fingerprints, driving records and criminal records. For more information on background checks, see Chapter 5.

Interviews

Interviews are a two-way process. Potential volunteers use the interview to see if they fit with the organization's style, the position is what they thought it would be and if they can be helpful to the program. The interviewer makes sure that potential volunteers understand the organization's mission, how the program works and what help it needs from volunteers.

Asking the right interview questions helps to clarify whether or not the volunteer will fit well in the volunteer program. For example, while a volunteer may not have the exact skills needed for a particular job, a good interview can elicit other information that will pinpoint how that volunteer can fulfill a personal call to service and help the *Faith in Action* program in other ways. For more information on interviewing, see Chapter 5.

RISK MANAGEMENT POLICIES AND GUIDELINES

Volunteer Position Descriptions

Position descriptions are key elements in a successful screening process. They are an integral part of risk management and make it much easier to screen, place and evaluate volunteers in a fair and reasonable way. Well-written volunteer position descriptions also help volunteers screen themselves, by letting them determine whether or not they have the necessary time, skills and interest to accomplish the tasks outlined. Volunteer position descriptions also help identify questions for the volunteer interview. For more information on developing and using volunteer position descriptions, see Chapter 2.

Volunteer Agreements

Once an agreement is reached with a volunteer on their placement within the organization, the relationship can be formalized with a volunteer agreement. The volunteer agreement is intended to ensure that an understanding exists between volunteer managers and volunteers regarding their respective roles and responsibilities. For a sample *Faith in Action* volunteer agreement, see Appendix 5B at the end of Chapter 5.

Volunteer Program Policies

Volunteer program policies are rules and regulations that govern the general operations of the volunteer program. Risk management should figure prominently in these policies. Build risk management in when setting volunteer management policy:

- Identify risks for each volunteer position.
- Rewrite volunteer position descriptions to describe the knowledge, skills and other personal resources needed to avoid or deal with the risks you've identified.
- Screen potential volunteers based on risk factors. Develop a list of qualifications that volunteers will need in order to fill specific roles and keep a list of potential trouble areas.
- Train volunteers based on risk factors. Create volunteer orientations that cover basic rules and regulations. Develop trainings that address specific areas of concern, such as how to get help in emergencies.
- Train staff to identify risks.
- Develop a list of procedures, operational rules and guidelines for problem situations.

Insurance

Insurance does not keep problems from happening. But in the event of trouble, insurance will help pay some of the costs of investigating the problem or defending the agency if a suit is filed. The types of insurance you need will depend on the types of claims that may be filed. These fall into two basic categories:

- Claims filed against the organization because of harm or loss suffered by a volunteer or by a care recipient
- Claims filed against the volunteer

No one type of insurance can cover an organization against all types of loss. It is therefore important to carefully assess your volunteer program's areas of vulnerability and plan accordingly. Types of insurance for your program to consider include the following:

- Directors and Officers' Liability Insurance (also know as D&O or board insurance) covers against claims of "wrongful acts," such as irresponsible management or mistakes in conducting daily operations made by directors, officers, employees or volunteers. No standard D&O policy exists, so policy wording must be carefully studied to ascertain who is covered and under what circumstances.
- Umbrella Liability can be added to most types of insurance polices to extend the amount of coverage provided.
- Key Person Insurance protects an organization if a key person becomes disabled or dies. The insurance could cover the cost of finding, hiring and training a replacement.

- General Property insurance is important to have if you own or rent office space. Organizations should consider whether or not the policy should include all risks associated with the property or include a list of exclusions. It is also important to stipulate that insurance should cover the cost of reimbursement for the total cost of the property, not its current depreciated value. If relevant, consider a blanket limit option that allows the organization to cover multiple properties under one policy.
- Fiduciary Liability provides coverage for wrongdoing that might occur related to employee benefit funds.
- Special Event Liability is of benefit for programs that hold fund-raising events, annual conventions, meetings or conferences. Coverage ensures that expected revenues are not reduced or eliminated due to event cancellation or other risk.
- Commercial General Liability (CGL) insurance covers lawsuits filed by the general public that claim bodily or personal injury or property damage. It would also cover claims made by a volunteer that injuries resulted from negligence on the part of the nonprofit. Types of injury alleged can include property damage, bodily injury or personal injury (false arrests, defamation). In general, these polices provide a defense and pay a settlement or judgment, whether the claim is true or not, up to the policy limit. Most policies do not provide coverage for volunteers, but in some cases can protect the organization from the actions of its volunteers. For organizations with a significant number of volunteers, volunteer liability insurance exists which covers only volunteers. Be sure to read your own insurance policy carefully. Some policies do not protect the organization from lawsuits filed by volunteers.
- Fidelity Bonding guarantees a reimbursement to the organization for any financial losses caused by fraudulent or dishonest acts by board members or employees, such as embezzlement or theft. Check with your insurance agent to see if this coverage can extend to volunteers as "unpaid staff."
- Workers' Compensation Policies are permitted to include volunteers in some states. Check with your local insurance agent or state insurance board to see if this is possible.
- Volunteer Accident Policy is insurance that covers costs for medical treatment of volunteers who are injured while delivering services for the organization. These policies usually pay the costs of emergency room services and follow-up treatment to predetermined limits. An accident policy for volunteers does not cover illness, nor does it protect the organization from liability for an injury. A volunteer's own health insurance will be considered the primary insurance coverage.
- Volunteer/Employee Dishonesty Coverage is offered by some insurers to directly target risk related to volunteer or employee behavior, including embezzlement or other forms of theft.

If volunteers are not insured under the nonprofit's CGL, D&O or professional liability policies, they may be covered by their personal homeowner's policy or a volunteer liability policy.

- Homeowners Policies may cover some volunteers who are homeowners. Many homeowners policies cover damages resulting from property damage or bodily injury, although they do not cover losses resulting from wrongful acts. Since these policies vary greatly, it is important to have your volunteers check their policies and discuss their volunteer service (including board service) with their insurance agents.
- Volunteer Liability Policy is coverage typically packaged with a volunteer accident policy purchased by a nonprofit. Such policies may include personal liability insurance coverage and additional automobile insurance coverage beyond a volunteer's own coverage, as part of a volunteer insurance package. The personal liability coverage provides protection for a personal or property damage claim resulting from a volunteer's work on behalf of the organization. Check with your insurance agent about exclusions and exceptions.

Many insurance companies provide insurance and risk management services to nonprofits. Various insurance providers are listed at www.nonprofitrisk.org.

Most *Faith in Action* programs have general liability insurance and some also purchase D&O insurance. When seeking insurance for your program, here are some things to do:

- Ask your insurance agent to help identify the most important insurance needs for the program.
- Contact several providers to compare prices.
- Enlist the board and advisory committee in determining the best protection plan for the volunteer program.
- Contact other *Faith in Action* volunteer programs that provide similar services to find out what types of insurance they carry and which insurers they deal with.

RISK MANAGEMENT IN SPECIAL CASES

Board/Advisory Committee Liability

Board or advisory committee members have special responsibilities and liabilities associated with their roles in the volunteer program. Meeting a board's legal responsibilities is not easy, but some basic tools can enhance the board's ability to act properly. For example:

- A board manual provides members with essential documents and information on the organization's history, structure and activities as well as their board responsibilities. For a sample Board Code of Ethics, please see Appendix 3B.
- Orientation and training bring new board members up to date quickly and provide ongoing training for new and returning members alike.
- Board minutes and written records of board meetings document the board's actions and keep members informed.

Questions for the Board or Advisory Committee

- Do you keep thorough and accurate records of meetings, correspondence and legal discussions? Do meeting minutes include an easy-to-follow summary of decisions made, points of discussion and dissent votes?
- Do you have a board member manual and clear operating procedures?
- Is there a process for bringing a complaint to the board? Is there a process for lodging a complaint about the board? Are there processes in place to resolve complaints once reported?
- Do you explore different options before making a final decision?
- Do you solicit outside opinions? Do you ask for legal advice when appropriate? Do you provide opportunities for care recipients, volunteers, community members and staff members to serve on the board? If you have young people who work as volunteers, do you have a young person as a board member?

TIPS

Insuring Board or Advisory Committee Members

If you're considering insurance for board or advisory committee members, these are some points to ponder:

- Advisory committees and boards have many responsibilities that can leave the organization and its leadership open to risk. It makes sense to provide insurance. The type of insurance that covers board members is called Directors and Officers' Liability Insurance.
- Small or start-up nonprofits may find D&O insurance to be costly, but it is possible to tailor the elements of an insurance plan to the specific needs of your organization. Talk to insurance agents about your most urgent insurance needs.
- Just as in other types of insurance, the costs of policies can differ from agency to agency and policy to policy. Compare and contrast the types

of coverage offered, the limits of the coverage, duration of coverage and deductibles.
- Even if your board members or advisory committee members are covered by other organizations or policies, that does not mean they are covered to serve in your leadership groups. Any policy that covers one of your board members should be carefully checked for limits. It will probably be necessary to invest in your own insurance.

Do not rely on so-called "charitable immunity" to protect your volunteer program from liability. In all but a few states, charitable immunity has been abolished. In states that do not recognize charitable immunity, nonprofits can be held responsible for negligence that is the result of foreseeable harm. Also, during the past decade, many states have adopted volunteer protection legislation. These laws provide limited immunity for certain volunteers under certain circumstances, but this immunity does not extend to the organizations for which they volunteer.

The federal Volunteer Protection Act (VPA) takes precedence over state laws, except when state laws specifically provide more protection. But neither the VPA nor state laws prohibit lawsuits. Even when a law allows your volunteers to escape liability, substantial sums may be spent defending against frivolous claims. D&O coverage typically covers defense costs as they are incurred.

Group Projects

Most episodic (one-time or short-term) volunteering is built around group projects. Responsible planning for group projects must include attention to preventing injury and addressing issues of liability, insurance coverage, medical treatment, authorization and assumption of risk. According to the Nonprofit Risk Management Center of Washington, DC, there are three keys to an effective risk management plan for a group activity:

- Commit to protecting the rights and safety of those involved in the project.
- Communicate that commitment to the community.
- Be consistent in following through with an effective risk management plan for the project.

QUICK LIST

Group Project Risks

Answering the following questions will help you manage the risks associated with a group project for your *Faith in Action* program.

- What level of security is needed at the project site?
- What type of security does the site or event require (e.g., badges to enter the area for all attendees, identifying badges or ribbons for staff and volunteers, check-in process for identification, security guards, etc.)?
- Does the site's host organization have access to a security company to help you address special security needs?
- What policies, practices and insurance coverage are needed for the host and other partners?
- What release and waiver liability forms are required? Who will supervise their distribution and collection? (Check with a lawyer.)
- Do you know a legal representative who can look over your release forms?
- Do volunteers need to undergo more specific screening requirements? Do you know how to contact the local county and district court office to get background check forms?
- Would one of your corporate sponsors be willing to fund the cost of doing background checks, if necessary?
- What precautions have you taken for medical treatment and authorization on-site?
    - Are first aid kits needed for the site? Who will provide them?
    - Where will first aid stations be located?
    - Who is trained to provide first aid?
    - What is the chain of command if someone is injured?
    - Where is the nearest hospital or medical center?

Joint Projects and Collaborations

Working with others on joint projects can offer outstanding benefits to the program as well as special challenges for risk management. It is important that all partners in the venture have a clear understanding of their roles and responsibilities in regards to risk management. You will want to evaluate your plan and make changes when developing each new group project, when working with new partners and when selecting project sites.

- Review insurance coverage of your organization and other partnering groups and update them if necessary to match the risks of your shared objective. Do not assume your partner's insurance will cover you.
- Consult an insurance agent and lawyer when developing your shared risk management plan.
- Review your state's restrictions and regulations regarding children, youth and vulnerable populations.
- Establish screening procedures for all volunteers.
- Establish effective supervision for all volunteers.

Appendix 3A

Sample: Crisis Management Plan

In the event of any occurrence that involves a life-threatening situation, a fatality or other occurrence that might cause substantial news media interest, the following procedures should be followed at the scene:

1. Give priority to the protection of the injured person or take such action as necessary to reduce danger.
2. Notify the executive director (or, in the director's absence, others as listed below):
    a. Executive director and contact information
    b. Board president and contact information
3. Have Director or Board member contact the *Faith in Action* National Office Crisis Response Team to develop an appropriate response. (The *Faith in Action* Crisis Plan is available by contacting the national office at 877-324-8411.)
4. Make NO statement (oral or written) that could be interpreted as either an assumption or rejection of responsibility for the occurrence.
5. Do NOT give information to any representative of the news media.
6. Do NOT speculate to anyone as to the cause, motive or outcome of the situation.
7. Get names and addresses of all witnesses or others involved.

Appendix 3B

Sample: Board Codes of Conduct and Ethics*

Codes of conduct and ethics as well as conflict of interests policies for boards of directors help members focus on their duties and responsibilities, offer guidance on recognizing and dealing with ethical issues, provide ways to report unethical conduct and help create an atmosphere of honesty and accountability. Directors are expected to comply with both the letter and spirit of their codes. While codes do not foresee every circumstance that may arise, they can provide guiding principles for directors.

Codes of conduct often are based on certain principles of nonprofit corporation law that dictate that board members' conduct meets certain standards. These standards are usually described as the duty of care, the duty of loyalty and the duty of obedience. If there is a question about whether or not a board has fulfilled its legal and ethical responsibilities, often state-level statutes which encompass these standards are used to determine whether a board member acted improperly.

Duty of Care

The duty of care deals with the expected competency of board members. Duty of care includes actions that an ordinarily prudent person would exercise in a similar position under similar circumstances. This means that a board member should exercise reasonable care when making decisions for the organization.

Duty of Loyalty

The duty of loyalty requires board members to give undivided allegiance when making decisions that affect the organization. This means that board members cannot use information learned as board members for personal gain.

Duty of Obedience

The duty of obedience requires board members to be faithful to the organization's mission. They cannot act in ways that are not in agreement with the central goals of the organization.

Areas often covered in board codes of ethics (with sample wording) include:

A. Conflicts of interest

- Board members have a paramount interest in promoting and preserving the public trust. Directors should avoid any conflicts of interest between themselves and the organization. Any situation that involves, or may reasonably be inferred to involve, a conflict between a director's personal interests and the interests of the organization should be disclosed.
- Directors may not engage in any conduct or activities that are inconsistent with the organization's best interests or that disrupt or impair the organization's relationship with any person or entity with which the organization has or proposes to enter into a business or contractual relationship.
- Directors, and all members of their immediate families, should avoid the acceptance of substantial gifts in those cases where such substantial gifts are being made in order to influence the directors' actions as board members or where acceptance of such gifts gives the appearance of a conflict of interests.
- Directors should not accept compensation for services performed for the organization from any source other than the organization.
- Directors may not use the organization's assets, labor or information for personal use unless approved.

B. Corporate opportunities

- Directors are prohibited from taking for themselves opportunities related to the organization's business, using the organization's property, information or position for personal gain, or competing with the organization for business opportunities unless the board determines the organization will not pursue an opportunity.

C. Confidentiality

- Directors should maintain the confidentiality of information entrusted to them by the organization and any other confidential information about the organization that comes to them, from whatever source, in their capacity as a director, except when disclosure is authorized or legally mandated.

D. Compliance with laws, rules and regulations; fair dealing

- Directors shall comply, and oversee compliance by employees, officers and other directors, with laws, rules and regulations applicable to the organization.
- Directors shall oversee fair dealing by employees and officers with the organization's clients, volunteers, donors and vendors.

E. Reporting of any illegal or unethical behavior

- Directors should promote ethical behavior and take steps to make sure the organization encourages employees to talk to supervisors and other appropriate personnel about the best course of action in a given situation; encourages employees to report violations of laws, rules, regulations or codes of conduct to appropriate personnel; and informs employees that the organization will not retaliate for reports of violations made in good faith.

F. Compliance procedures

- Directors should communicate any suspected violations of this code promptly to the appropriate committee. Violations will be investigated by the board or by a person or persons designated by the board and appropriate action will be taken in the event of any violations of the Code.

Language for this code was adapted from the Fannie Mae Code of Business Conduct and Ethics and Conflict of Interests Policy for Members of the Board of Directors provided on their Web site at www.fanniemae.com.

*BoardSource
1828 L Street NW Suite 900, Washington DC 20036-5114
202-452-6262 or 800-883-6262 Fax 202-452-6299
http://www.boardsource.org/FullAnswer.asp?ID=103

Volunteer Recruitment Strategies

4

OVERVIEW

Recruiting volunteers is almost always listed as the number one skill that both new and experienced coordinators want to learn how to do more effectively. Recruitment that brings positive results is not a mystery and need not be a chore. In fact, it can be quite enjoyable if you follow a proven process and keep some key information and tips in mind.

This chapter shares some ideas on how to avoid common pitfalls many coordinators encounter when recruiting volunteers. More importantly, it guides *Faith in Action* volunteer coordinators in creating and implementing an effective recruitment strategy for their local programs. The chapter recommends four basic steps:

- Identify potential volunteers.
- Create effective recruitment messages.
- Select the right audiences and modes of communication.
- Implement your plan.

Basing your recruitment campaign on these four components will help to bring in volunteers who are a good fit for your program and the positions available.

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PURPOSE OF RECRUITMENT

The purpose of recruitment is to find the right person for the right position who is available at the right time and place. Effective recruitment is based on volunteer position descriptions that have been created to "exchange needs" between a local *Faith in Action* program and its volunteers. This means that both the program and the volunteer must benefit by receiving something of value from the volunteer's involvement. The volunteer may benefit by making new friends, developing new skills, fulfilling a spiritual call to service or adding meaning to his or her life. The program may benefit by expanding its services to more care recipients, creating new support services for other volunteers or deriving other valuable assistance from a volunteer's services.

Once a program has developed effective volunteer positions, recruitment strategies can be built around four steps:

1. Identify groups of potential volunteers who are likely to have the skills, interests and motivations that would entice them to volunteer for specific volunteer positions.
2. Create carefully crafted recruitment messages directed to specific groups of potential volunteers.
3. Select places to find the desired groups and effective ways to distribute the recruitment messages to these groups.
4. Implement the program's recruitment strategies.

Common Myths in Volunteer Recruitment

These myths spell trouble for your volunteer recruitment efforts:

Myth 1: It is the job of the volunteer coordinator alone to plan and implement a recruitment strategy for the volunteer program.
Myth 2: Recruitment is the first step in developing a volunteer program.
Myth 3: People are motivated to volunteer by guilt, arm-twisting and shaming.
Myth 4: The program has to accept anyone who indicates an interest in volunteering and create a position to fit what the volunteer wants to do.
Myth 5: It is easier to ask the same traditional groups of volunteers repeatedly to do more and more, while other groups go unnoticed and are never asked to volunteer.

REVIEWING VOLUNTEER POSITION DESCRIPTIONS

Volunteer position descriptions are the foundation for effective recruitment. Before recruiting begins, assessing needs and creating position descriptions are the first steps in developing a volunteer program. Occasionally, a position can be designed to take advantage of a volunteer's unique talents or skills, such as building a Web site or compiling oral histories of care recipients' families, but this should not be standard practice for volunteer recruitment. It is a reactive approach that can easily distract programs from their purpose and priorities.

> If you don't know what you want volunteers to do,
> you don't know whom to recruit and where to look for them!

As you create or review volunteer position descriptions, make sure they meet these two criteria:

- Positions focus on accomplishing tasks and responsibilities that assist the program in meeting its goals, mission and priorities. Volunteers are a valuable resource; don't waste their time or other program resources by having volunteers work on irrelevant tasks or in programs that have outlived their usefulness.
- Positions are designed to meet the motivational needs of potential volunteers.

If a volunteer position description does not meet either of these criteria, it should either be redesigned or eliminated entirely. For more guidance on how to develop effective volunteer position descriptions, see Chapter 2.

IDENTIFYING SOURCES OF VOLUNTEERS

The first step in developing a recruitment strategy is to identify likely sources of volunteers for each position and to specify benefits that will motivate these groups to get involved. These volunteers are out there. As discussed in Chapter 1, the general public is looking for ways to make meaningful contributions in their communities, and volunteer programs address this need in an essential way. A survey by Independent Sector in 2001 indicates a particularly positive outlook for recruitment efforts in interfaith programs:

- Of people stating they are willing to volunteer, 93 percent said they would be more likely or equally likely to volunteer if the program were coordinated by a faith-based organization.

- People who regularly attend religious services volunteer at a much higher rate (54%) than those who do not attend religious services on a regular basis (32%).

Many *Faith in Action* programs focus volunteer recruitment through their member congregations, but they may continue to rely on the womens and men's groups that have been the mainstay volunteer pool of most houses of worship. A more effective approach is to "segment" the congregations into other target groups. Overusing the same people causes burnout, even as many other groups of potential volunteers within the congregations go untapped, such as religious study classes, community or social action committees and youth groups.

It makes sense to avoid chasing after the same volunteers as other agencies or to continue to recruit from only one or two types of potential volunteer groups. Programs that consider "new" groups of volunteers—those generally overlooked by other nonprofit agencies and organizations—usually have more success in their recruitment strategies. Look for new, reliable sources of volunteers who will fit the program's needs. Young people, older adults, families, people with disabilities and employees are just a few groups you can focus on when planning your recruitment strategy. There are many more sources for new volunteers—people who are unemployed, veterans, relatives of former care recipients, etc. The public can be segmented in many ways so that programs can appeal to various populations for specific positions. For more information on demographic changes in the volunteer population, see Chapter 1.

Success Story

A *Faith in Action* program in Atlanta developed a Web site through one of their volunteers and linked the site to www.VolunteerMatch.org. They have been encouraged by the responses and have added many volunteers that otherwise would not have been reached through a congregational outreach. This method of recruiting seems to bring them high-quality volunteers and required very little investment. The Web site development was donated by one of their volunteers. The Web hosting fees for the site are about $200 for two years. Linking with Volunteer Match was free.

From a *Faith in Action* Program in Atlanta, Georgia

Faith in Action programs find great success in designing positions for and recruiting from the community at large. Both within congregations and in the greater community, there are many "nontraditional" sources for volunteers. Remember to point out the specific benefits of a position in order to motivate or encourage people in these groups to volunteer.

Young People

Volunteering is a powerful tool for teaching civic responsibility and a positive way of connecting young people to their communities. Volunteers can come from any age group, and young people bring limitless energy, curiosity and a keen interest in making a difference.

Look for young volunteers in these places:

- Church and synagogue youth groups may be looking for ways to get involved in meaningful community service.
- Local schools may have community service requirements and service learning coordinators. Often, students in these schools must complete a certain number of hours of service within the community as graduation requirements.
- Youth organizations, clubs, scouting groups, sports leagues and connections through friends and parents are other good ways to reach out to young people.

TIPS

Involving Young Volunteers

To involve young volunteers more effectively, follow these tips:

- Bring in young people from the beginning and listen to their ideas during all phases, including the planning of volunteer opportunities.
- Consider developing a youth advisory team whose members provide input and serve as ambassadors or recruiters for other youth volunteers.
- Consider issues such as transportation and time limitations and design volunteer positions that are flexible.
- Use young volunteers' heads and hearts, as well as their hands.
- Develop training that teaches young people what they need to know and do to be successful.
- Include fun and informality.
- Plan activities aimed at including youth as partners with current volunteers. Don't let current volunteers exclude young volunteers.
- Have youth volunteers work with responsible role models. Their behavior and attitudes will reflect what they are taught.
- Make expectations clear.
- Show them step by step what is involved in the job or task assigned to them.
- Keep lines of communication open by asking questions and really listening to their answers and questions.
- Take the input of youth seriously and be willing to learn from them.
- Build a partnership by not withholding information and knowledge from them.

Appeal to young volunteers with these benefits:

- Working with peers and intergenerational teams
- Learning new skills and gaining new knowledge
- Making a difference in the community
- Helping others
- Gaining respect and putting new ideas to work
- Getting useful work experience and exploring careers

For a sample Guardian Consent Form, see Appendix 4B.

Older Adults

This population group continues to grow in numbers as Baby Boomers age and retire. Never before have older adults enjoyed better health, more education or more leisure time. In keeping with their plans for active and engaged retirement, many of today's older adults want to incorporate volunteering into their lives. They want to participate in meaningful ways, be intellectually challenged and use their talents and life experiences to make a difference.

Look for older adults in these places:

- A 2001 survey for the Corporation for National and Community Service found that nearly two-thirds of volunteers aged 55 and older look for volunteer opportunities through their churches, mosques, synagogues or other places of worship.
- Many businesses and corporations have groups for retirees and pre-retirees.
- Senior centers, clubs, AARP chapters, Retired and Senior Volunteer Program (RSVP) offices and associations are other places to look for help from older adults. For RSVP contact information, see Appendix 7A at the end of Chapter 7.

Strategies for Contacting Older Adults

More than ever, older adults want to use their skills and expertise in their volunteer jobs. Identify specific professions that could benefit your program (retired teachers, nurses, accountants, lawyers or others) and then develop a strategy for contacting these groups in your community. For ideas, ask a retired nurse, teacher or accountant how they stay in touch with each other.

According to a survey conducted in 2002 for Civic Ventures, a national organization that works to expand the contributions of older Americans to society, the most important reasons that older adults volunteer include the following:

- Having something significant to do
- Being intellectually stimulated
- Being able to share life lessons
- Feeling valued and productive
- Having a sense of discovery and adventure
- Contributing to society and making a difference
- Working as part of a group of people with a clear and important purpose
- Being able to use career-related skills

Families

One of the newest and most receptive volunteer audiences is the family. As early as 1987, a survey by the J.C. Penney Company revealed that 55 percent of non-volunteers felt that involving their families would be an important incentive for them to volunteer.

Another survey conducted by Independent Sector in 1998 indicated that 28% of all Americans had volunteered with a family member, and 51% of all volunteers have participated in family volunteering. Fifty percent of those who volunteered with their families did so through a religious organization.

Families come in all shapes and sizes. According to a George Gallup poll, the most common family type involved in volunteering is the nuclear family (60%). The next most common is the couple without children (25%). One-parent households account for 9 percent of family volunteer groups and 5 percent are extended families—households with several adults (aunts, uncles, grandparents, etc.) and one or more children. The key to recruiting families is letting families define themselves and decide who is part of their family.

To involve families effectively, design volunteer projects specifically with families in mind:

- Provide volunteer opportunities that allow for a wide range of experiences, talents and skills.
- Ensure that some activities have an added educational component for children.
- Introduce family members to new experiences and new environments.
- Plan activities that are fun, active and hands-on.

These are some of the benefits that will motivate families to volunteer:

- Spending quality time together
- Seeing family members from a new perspective
- Discovering new talents and common interests
- Building relationships among family members

- Teaching values to children and strengthening belief systems
- Volunteering with someone close and familiar

A potential recruitment strategy to spur interest and open the door to family volunteering is to involve family members in volunteer recognition and training events for your current volunteers.

People with Disabilities

When recruiting people with disabilities, note that they can be found throughout the community. There are people with disabilities working in full-time jobs, attending worship services and schools, participating in clubs and civic activities and engaging in every aspect of community life. They will be in many of your audiences when you talk about volunteering. Your program's recruitment messages should include information that lets people with disabilities know they are encouraged to volunteer. Talk about accessible facilities, use large print for brochures and identify other aids that are helpful to people with disabilities. You may even find that some of your program's care recipients could serve as volunteers by providing telephone reassurance to other care recipients or writing special thank-you notes to other volunteers.

TIPS

Tips for Recruiting People with Disabilities

Here are some tips for increasing your effectiveness in recruiting people with disabilities:

- Consult with people with disabilities when developing volunteer positions and, as much as possible, make sure positions are accessible and inclusive of all volunteers.
- Avoid creating volunteer positions exclusively for people with disabilities. This can perpetuate the misconception that they are not able to participate fully and should be isolated from other volunteers and certain activities.
- Treat people with disabilities with the same respect and dignity you afford anyone else. They have their own preferences about how to do things—just ask.
- Call the Job Accommodation Network (JAN), a toll-free consulting service that provides information on job accommodation for people with disabilities, at 800-526-7234.

In addition to your regular sources for volunteers, there are some other places to look when recruiting people with disabilities:

- Agencies that provide disability services
- Clinics, hospitals and support groups
- Local universities and colleges

People with disabilities may be particularly interested in these volunteer benefits:

- Developing skills and job references that increase employability
- Meeting people and making new friends
- Gaining satisfaction and feeling needed
- Making a difference in the community
- Providing service to others

Business and Workplace Volunteers

More and more businesses are encouraging their employees and retirees to get involved in local community services. Since the 1970s, more and more companies have turned to augmenting their cash and in-kind giving with volunteer resources. Despite economic shifts, the business value of volunteerism has never been stronger. Increasingly, employee volunteer programs are offering time off to employees during work hours to enhance the company's image in the community and promote employee loyalty and morale.

There are many ways to involve employees and their families in volunteering:

- Provide benefits to the employer as well as the employee, through volunteer projects that offer opportunities to heighten the company's visibility, enhance its public image and build customer loyalty.
- Design volunteer opportunities that are aligned with a specific company's business objectives. For example, some businesses such as insurance or medical supply companies have a natural interest and commitment to health care. For such companies, you can easily make a case for why they should get involved in your home care program and interest their employees in volunteering.
- Design positions or group projects that can improve teamwork and communication among employees.
- Encourage businesses to ask their retired workers to join employee volunteer groups.
- Identify small businesses in your community. Do not limit your efforts to large corporations and formal employee volunteer programs.

- Contact the right person in the company. In a large corporation with an employee volunteer program, an employee volunteer director or community relations staff is usually the contact person. In smaller businesses, contact the owner directly.

Employees may find these benefits to be the most appealing:

- Developing skills and advancing professional development
- Giving back to the community
- Working with other employees on projects outside the workplace
- Gaining recognition from employers for volunteer work and achievements

Episodic Volunteers

More and more, individuals are looking for flexible volunteer opportunities. If your program's current positions are mainly weekly and ongoing, consider creating positions that can be shared among a care team of volunteers. For example, you could ask existing groups (youth groups, garden clubs, workplace volunteers, etc.) to develop teams of five or six people who will commit to friendly visiting and transporting one care recipient weekly to medical appointments and grocery shopping. Then let the team decide which team member will be there each week.

Determine whether you can frame other volunteer positions as episodic activities that can be completed by a group in an evening or on a Saturday afternoon. These episodic opportunities can enhance the important ongoing services of your *Faith in Action* program while also opening the door to new volunteers. Also, develop volunteer work that can be completed in volunteers' homes on their own time—for example, writing a newsletter, scheduling volunteers, developing recruitment pamphlets or making reassurance calls to care recipients.

CREATING RECRUITMENT MESSAGES

Volunteer recruiters often make the mistake of merely talking about their programs and what volunteers do and calling it "recruitment." In contrast, effective recruitment has a specific message to convey to each group of potential volunteers. Powerful recruitment messages include the following key points:

- Benefits and rewards of participating in a particular volunteer position
- Features of the position—descriptive elements such as when, where, what and with whom

As discussed, the benefits of the volunteer position are what motivate individuals to volunteer. Features of the volunteer position, on the other hand, help individuals to decide whether the position is right for them. Where, when and how are often crucial questions to answer in your program's recruitment messages. Not only should you include the time of day, but also whether it is an episodic (one-time), occasional, monthly, weekly, short-term or long-term position.

In your recruitment messages, don't forget to include any benefits that might appeal to certain groups of volunteers, such as CPR or first aid training for individuals who are interested in developing these skills. The following are some examples of recruitment messages that convey both benefits and features:

EXAMPLE 1

Want To Make a Difference in Someone's Life?

Become a *Faith in Action* Medical Driver for a senior resident in your community. Take a senior to medical appointments as needed, assure safety and security in transit and make a new friend at the same time! The only requirements—

- Availability about 7 hours per month between 7 A.M. and 2 P.M.
- Driver's license and a good driving record
- Access to a car and auto insurance
- Willingness to attend a two-hour training session
- Optional bonus: free CPR and first aid training course

Please call Denise at *Faith in Action*, 123-4567, 8 A.M. - 4 P.M., Monday - Friday.

Benefits mentioned:

- Help others and make a real difference in someone else's life.
- Receive optional free training in CRP and first aid.
- Develop a friendship with a local senior resident.

Features mentioned:

- Commit to 7 hours monthly during the daytime hours.
- Have access to a car, driver's license, good driving record and insurance.
- Attend a two-hour training.

Example 2

Would You Like To Make a Difference in a Neighbor's Life this Summer?

Volunteer to help an elderly or physically impaired neighbor in need. Your neighbor's independence depends on you! Share your compassion with neighbors and help ease their loneliness and isolation.

As a volunteer, you can provide any of the following services and decline down any request for service that you cannot or do not want to do:

- Drive neighbors to the doctor, pharmacy, grocery store, etc.
- Do grocery shopping for shut-ins.
- Visit neighbor on a weekly basis.
- Provide respite care for caregivers.

Services may be provided on weekdays and/or weekends, daytime and/or evenings. Volunteers must attend one 2-hour training session in the evening or daytime.

Please call the City Area *Faith in Action* at 123-4567 to sign up or get more information. Office hours are 8 A.M.-4 P.M., Monday - Friday.

Benefits mentioned:

- Make a difference in the life of a neighbor.
- Ease someone's loneliness.
- Live your beliefs by sharing compassionate service.

Features mentioned:

- Select only the services you want to provide.
- Complete a two-hour training session.
- Volunteer once a week in the daytime, evening or weekend .

Recruitment messages should highlight the benefits and share the features. This allows potential volunteers to understand why they should volunteer and to visualize how the position will "fit" into their lifestyles, so they can make an informed decision. Note that these recruitment messages are not about twisting arms, making people feel guilty or shaming them into doing something they do not want to do. They focus on finding desired groups of people and sharing information about volunteer opportunities that will enrich their lives.

Be Positive and Honest

The recruitment message should always be positive but honest. Do not misrepresent the position. You will only lose a volunteer and create distrust if the position is exaggerated or falsely advertised.

Finally, when developing recruitment messages, do not forget to acknowledge differences in individual interests and personalities. Appeal to the variety of motivations that move people to become involved in volunteer service. For more on volunteer personalities and motivations, see Chapters 1 and 2.

GETTING RECRUITMENT MESSAGES TO VOLUNTEER GROUPS

Locating Potential Volunteer Groups

This step concentrates on narrowing your field and directing your efforts to find potential groups of volunteers for each volunteer position. For example, imagine that your program's recruitment task force needs a volunteer with public relations and marketing skills. Where would you find such a person?

First, brainstorm with others and generate a list of possible leads:

- Contact the public relations firm across the street from your office.
- Ask current volunteers if they know someone with public relations skills they can recommend.
- Recruit a graduate student in public relations at the local college or university to serve as an intern.
- Ask your local Volunteer Center to assist in finding a volunteer.
- Look for a congregational volunteer who is especially creative and wants a new challenge.

Be as specific as possible about where to find someone to fill the position. Then go back through the list and determine which sources might be the most productive and cost effective. You may decide to erase some ideas altogether or try only the top one or two leads. Or you may want to include several of the top ideas in your recruitment strategy, especially if you need a number of people for the same position. The point is, if you plan a strategy for each position, you will be more productive in your recruitment activities and waste less time and fewer resources.

Be Creative

Be creative and find new places that other volunteer organizations and agencies may never have considered.

Delivering Recruitment Messages

After you have determined where you will find the volunteers you need, focus on how you will deliver your recruitment message. Brainstorm another list, this time asking yourself and others, "What are the best methods for making contact?" Here are some possibilities for the public relations volunteer position:

- Call the owner of the public relations firm and set up an appointment to discuss your volunteer position and solicit assistance in locating someone.
- Send a memo to current volunteers and board members outlining the position and asking for any contacts they may have.
- Post your need for a public relations volunteer in your monthly newsletter.

Ways to Make Contact

The best methods for making contact will vary with each group, but this list presents several ways to connect with potential volunteers:

- Presentations and speakers
- Posters
- Brochures
- Letters
- Booths at public events
- Mass mailings
- Face-to-face appointments or calls
- Newsletters
- Press releases to local media
- Local cable access TV
- Billboards
- Internet Web sites
- Inserts in paychecks or other mailings, such as utility bills
- Church bulletins
- Public bulletin boards

When selecting the appropriate recruitment methods for your targeted group, keep these ideas in mind:

- People respond most favorably to personal communication (one-on-one or in groups).

- The best recruiters are satisfied volunteers from your program who can spread the word informally to others, by talking about the program, sharing stories and conveying the rewards of their volunteer work. Remember to tell your volunteers of the important role they play in recruitment.
- The most successful recruiters have similar characteristics as their audience; it is best to have youth recruit youth, retirees recruit other retirees and so forth.
- Mass media and community-wide recruitment techniques are most effective if a large number of volunteers are needed, no specialized skills are required and the positions are flexible. (For example, announce opportunities to do yard work for care recipients during summer weekends or help with an annual special event fund-raiser such as an auction or gala.)
- Keeping track of recruitment results helps you determine what works and what doesn't for future recruitment campaigns.
- Some *Faith in Action* programs have found that getting a recognizable phone number or Web site, such as 555-CARE, is a great way to assist in recruiting volunteers.

Just Ask

The main reason people do not volunteer is because no one asks them. When asked to volunteer, 63 percent of people say yes. The percentage is even higher for congregational members.

Your recruitment messages and strategies are the "ask." Make sure potential volunteers know they have been asked and what you want from them.

IMPLEMENTING YOUR STRATEGIES

The worksheet in Appendix 4A at the end of this chapter is designed to help capture the ideas and plans generated in the previous steps. Once you have completed this worksheet, your final step is to implement the strategy. But who will do the work, especially if you are a one-person staff? In fact, who will do all the preparation work leading up to implementation?

Recruitment Task Force

Among the first volunteer positions you develop and the first volunteers you recruit should be a volunteer recruitment task force or committee to help you plan and implement your recruitment strategy. Committee members might come from your coalition, existing volunteers, the board, care recipients or the community at large. No volunteer coordinator can or should handle recruitment alone. Bring in volunteers who have the time and skills you need to get the job done effectively.

As with any volunteer position, determine what the work of the committee will be; what skills, experience and commitment you need and expect from the members; where you will find these volunteers; and how you will recruit them. There are a number of necessary skills, experience and other criteria to seek in these committee members. Not every member will have all of these attributes, but the committee as a whole should have the full range. These skills and criteria include the following:

- Writing and verbal communication skills
- Strategic planning skills
- Organizational skills
- Presentation skills
- Public relations and marketing skills
- Time to complete the work
- Representatives of desired groups (youth, retirees, employees, etc.)
- Representatives of key groups, such as congregational coordinators and liaisons

Responsibilities for these committee members will vary from one program to the next, but consider some of the following as committee responsibilities to be listed in your volunteer position description:

- Advise and work with the volunteer coordinator and committee chair to develop recruitment strategies for each position.
- Design recruitment messages.
- Create materials that are identified in the recruitment strategy, such as posters, letters, brochures, etc. (Many samples are available on the *Faith in Action* Extranet http://extranet.faithinaction.org)
- Schedule recruitment presentations (or individual appointments).
- Make presentations to groups or train others to make presentations.
- Track information on recruitment results.
- Set up interviews with the people who contact the program and are interested in volunteering.

Interfaith Coalitions

Faith in Action programs are very fortunate to have connections to interfaith coalitions that can provide an ongoing source of volunteers. Many programs already receive a good deal of volunteer and financial commitment from their coalition members. If your program wants to strengthen or develop this commitment, strategize with your recruitment task force about how to encourage further involvement. People will become more involved when they see a need they can fill. If you do not have a coordinator at each congregation, work with the pastor, rabbi or other leader to assist in selecting one. Know what you want this coordinator to do and what skills are needed and determine the benefits and features of the position. Think about how to integrate the coordinators with the recruitment task force and with each other.

If your program is just beginning to recruit and involve volunteers, or has only a few volunteers, don't expect to do everything at once. Select one or two key volunteer positions and focus your recruitment strategies on these positions. Bring in volunteers a few at a time and grow steadily. Before starting recruitment, make sure your program's screening, training and supervision structures can support the influx of new volunteers.

Worksheet: Recruitment Planning

Complete this worksheet for each volunteer position.

1. Volunteer position title:

2. List key skills and criteria needed in this position:

3. List benefits to volunteers and features (where, when, what, with whom, etc.):

   Benefits: Features:

4. Select groups that are good potential sources of volunteers for this position:

5. Develop recruitment message(s) using benefits and features that will appeal to the volunteer groups listed under #4:

6. Select where and how you will connect with each group of volunteers listed under #4:

	Where to Find	Ways to Inform
Group #1:		
Group #2:		
Group #3:		

Appendix 4B

Sample: Guardian Consent Form

In order for your child to become a volunteer with the *Faith in Action* program, we need your consent and your involvement in helping him or her to have a productive and rewarding experience. Please read and sign this guardian consent form if you would like us to continue our process of considering your child as a possible volunteer. Please call ______________________________ at __________________________ if you have any questions, would like further information or would just like to discuss this with a member of our staff.

Agency: *Faith in Action*

Prospective youth volunteer: ____________________ Date of birth: _________

Description of the anticipated volunteer work:

____

____

____

____

____

Anticipated schedule for the youth's volunteer work:

____

____

I understand that my child named above wishes to be considered for volunteer work and I hereby give my permission for him or her to serve in that capacity, if accepted by *Faith in Action*. I understand that he or she will be provided with orientation and training necessary for the safe and responsible performance of his or her duties and that he/she will be expected to meet all the requirements of the position, including regular attendance and adherence to agency policies and procedures. I understand that he or she will not receive monetary compensation for the services contributed.

Name (please print): ____
Relation to Volunteer: __________________________ Phone: ______________
Signature: _____________________________________ Date: ______________

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Volunteer Screening and Placement

5

OVERVIEW

Screening and placement comprise all the procedures and processes that organizations use to match volunteers with appropriate positions and ensure their ability to fulfill their volunteer roles. A solid screening process will facilitate the effective placement of volunteers. As you build your volunteer program, you can incorporate screening techniques throughout the volunteer placement process—from creating position descriptions to developing training calendars to instituting supervisory guidelines. This will help streamline volunteer placement and make it more likely that you will place and retain the best volunteer candidates in the right volunteer positions.

One key benefit to screening is the lower risk to volunteers, care recipients, staff and the organization. Screening protects care recipients from exposure to volunteers who may be incompetent or do harm. It lowers the organization's liability risks. It keeps volunteers from having to serve in positions beyond their level of competence. In addition, it maximizes the likelihood of their being placed in positions that makes full use of their strengths and interests. Having the right volunteers in the right positions simplifies many other volunteer coordination tasks.

Even when volunteers are affiliated with familiar organizations or congregations, it is still important to ensure that individual volunteers fit the program's needs and that *Faith in Action* can help them fulfill their call to service. By following the process explained in this chapter, volunteer coordinators can achieve this appropriate fit for all of their volunteers.

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UNDERSTANDING VOLUNTEER SCREENING AND

PLACEMENT

Screening helps volunteer coordinators achieve a proper fit between a prospective volunteer's skills, strengths and interests and the needs of the program. Not everyone is suited to every volunteer position. Screening maximizes your potential for placing the best volunteer candidate in the right volunteer position. When placing volunteers in positions of trust, where they will work with care recipients who are part of vulnerable populations such as the frail elderly or people with disabilities, screening ensures that everything possible was done to identify individuals who will serve and represent your *Faith in Action* program appropriately. It can also help you avoid potential risks by identifying individuals who are dangerous, who might pose an unacceptable risk in certain situations or who are unsuited for certain positions.

Volunteer applicants will also be screening the organization. Volunteers are a savvy group of people, and they may be aware of risk and liability issues. If they are considering volunteering for positions that serve vulnerable populations, they may be put off by lax screening processes and inadequate training that could leave them open to risk or accusations of negligence.

Screening is just the beginning of a process that includes selection, placement, training, supervision, monitoring and other measures designed to control wrongful or careless actions. But screening is not only meant to exclude individuals who can be harmful to the organization and those in its care. It can also identify individuals within the volunteer program in positive and affirming ways by matching volunteers with positions that offer opportunities for them to shine, grow and fulfill their personal call to service.

Screening is a win-win proposition for volunteers and the organization. It can even be a selling point for a volunteer program. An organization that builds a reputation for finding, training and retaining top-notch volunteers is a program that will have volunteers, care recipients and funders knocking on their doors.

TIPS

Volunteer Screening Checklist

- ☐ Does your organization assess all volunteer positions for the degree of possible risk and liability?
- ☐ Do all volunteers have position descriptions that describe the essential duties of their positions?
- ☐ Are all applicants for volunteer positions subject to a basic screening process that includes the following:
    - Applications and agreements?
    - Face-to-face interviews?
    - Background checks, when appropriate?

• Reference checks?
- ☐ Who follows up on references?
- ☐ Are police records or criminal checks requested when appropriate? (Check the local Department of Aging or the Department of Protective and Regulatory services to find out specific requirements in your area.)
- ☐ Is verification of licensure or educational credentials requested, when required for the volunteer position?
- ☐ Do volunteer orientations include information about risk and liability? Do they include a mechanism for feedback that encourages volunteers to express their hopes and interests?
- ☐ Do your volunteer training options match your needs for volunteer skills?
- ☐ Do you have an agreement that volunteers can sign that outlines mutual expectations between the volunteer and the *Faith in Action* program?

TIPS

Make Placements Quickly

Be sure to move as quickly and efficiently as possible through the screening and placement process, in order to keep the volunteer "on board." If a position cannot be found immediately, offer the volunteer an opportunity to help in the office or provide some other administrative service in the interim. It is important that volunteers understand that they are needed and valued.

The Volunteers for Children Act

The Volunteers for Children Act permits qualified entities, such as organizations that work with children, to conduct criminal background checks on their volunteers. Although volunteers are not required to undergo a criminal background check under this particular law, failure to perform such a check, depending on the position to be filled, may result in a negligent hiring charge being brought against the agency—something for which the organization could face criminal or civil liability. State law enforcement agencies can perform criminal background checks upon request. The applicant's fingerprints and written permission must be provided. Contact your state law enforcement agency for specific requirements and procedures. For more information on background checks and state laws and regulations related to volunteers, see Chapter 3.

Support for Recruitment, Training and Retention

Everyone wants to work in a place that feels both physically and psychologically "safe." The screening process will actually reassure volunteers. Rather than being dumped into "any old" volunteer position, volunteers whose interests, strengths and skills are taken into account during placement learn that the organization is a supportive place and that each individual plays a key role in accomplishing the organization's mission.
Position descriptions are an essential element of a successful screening process.

Not only are position descriptions integral to risk management, but without them it would be difficult to screen, place and evaluate volunteers in a fair and reasonable way.

Well-written volunteer position descriptions help volunteers screen themselves by letting them determine whether they have the necessary time, skills and interest to accomplish the tasks outlined. Volunteer position descriptions also help identify screening questions for the volunteer interview. For more on developing position descriptions, see Chapter 2.

To gather information that will be used in the later steps of the screening process, use a volunteer registration form. (A sample *Faith in Action* volunteer registration form can be found in Appendix 5A at the end of this chapter.) Gathering key information (e.g., past employment, education, credentials, references) in the beginning will make it easier to prepare for other parts of the screening process.

For example, information provided on the registration form may prompt questions to ask during the volunteer interview. Screening volunteers by asking the right interview questions helps uncover if volunteers fit well in the organization. A volunteer interview can elicit information that shows how a particular volunteer can help *Faith in Action* to achieve its mission, such as developing a Web site or working on a planned giving program.

These are some questions to consider when determining a volunteer's "fit" within the *Faith in Action* program:

- Does the volunteer have an interest in a particular position and the skills needed to fill the position?
- Does the volunteer embrace the mission of interfaith caregiving?
- Is the volunteer open to learning new skills?
- Does the volunteer have other interests and abilities that would help the organization meet its mission?
- Will the volunteer fit into the working environment (smoking or nonsmoking, relaxed or fast-paced, casual or formal, introverted or extroverted)?

Recruiting for a volunteer position does not end when the applicant enters the office. Prospective volunteers may still be deciding whether or not to sign up for the long haul. Volunteers will use the interview to see whether they fit the program and can be helpful. The interviewer makes sure that applicants understand *Faith in Action*'s mission, how the program works, and what help it needs from its volunteers. Volunteer coordinators can also help volunteers positively screen the program, by letting them know what orientation and training will be available to support them.

Create a Training Grid

TIPS

Create a grid of volunteer positions and the training available in your organization (or in the community) that will help volunteers acquire the skills needed to qualify for the position. This information can be featured in advertisements for the position, covered in volunteer orientations and discussed in interviews. It can also be incorporated as a checklist into volunteer evaluations as volunteers acquire the skills needed to advance into different roles.

Once an agreement is reached on the volunteer's placement, the relationship should be formalized and clarified with a volunteer agreement. A signed agreement between the organization and the volunteer is intended to ensure a clear understanding of the volunteer position description and the organization's policies and procedures. A sample volunteer agreement can be found in Appendix 5B.

A volunteer agreement should do the following:

- Spell out the volunteer's responsibilities to the program.
    - To perform volunteer duties to the best of their ability
    - To adhere to agency rules, policies and procedures, including record keeping requirements and confidentiality of program and care recipient information
    - To meet time and duty commitments, or to provide adequate notice so that alternate arrangements can be made
- Spell out *Faith in Action*'s responsibilities to the volunteer.
    - To provide accurate information, adequate training and assistance
    - To provide supervision, assessment and feedback
    - To respect the skills and individual needs of the volunteer
    - To create meaningful opportunities for the volunteer to fulfill a call to service

Screening does not end once a volunteer is placed. It is important to ensure that the volunteer remains the best person for the task. Mechanisms such as buddy systems, on-site performance, close supervision, performance reviews, program evaluations (particularly those that elicit care recipient input), unannounced spot checks and discipline and dismissal policies are ongoing screening mechanisms.

Background and Reference Checks

Background checks can be an essential strategy for *Faith in Action* programs that focus on vulnerable care recipients. Here are some questions to ask when establishing policies and procedures for background checks:

- Is there a state requirement for specific background checks?

- What type of background checks will be conducted for each position, and who will conduct them?
- Will the organization check fingerprints, driving records and criminal records?
- Does the parent organization (if applicable) have a policy that mandates specific background or reference checks for all volunteers?
- Is there a way to facilitate the reference process, such as using references provided by the *Faith in Action* volunteer's coalition group? References through coalition groups can help streamline and speed up the placement process.
- What types of references are most appropriate for the position—professional references that verify skills or personal references that verify desired character traits?

Types of Background Checks and Sources of Information*

Type	Example Positions	Sources
Criminal Records – Any recorded information in volunteer's name and date of birth pertaining to criminal convictions.	Any position in which volunteer will • Drive a vehicle • Have access to financial information • Have access to master keys or other security mechanisms • Work with children or vulnerable clients	County, state, and federal courts www.volunteerselect.com www.ussearch.com www.rapsheets.com
Department of Corrections Records – State-by-state	(See Criminal Records)	Most states have a Web site where a free search can be conducted.
National Wanted Fugitive Search	(See Criminal Records)	Most states have a Web site with the top wanted fugitives listed.
Motor Vehicle Records – Arrest warrants issued for failure to pay minor traffic fines, alcohol or illegal drug convictions and multiple accidents are some of the data available.	Volunteer Driver	State Department of Motor Vehicles www.volunteerselect.com www.ussearch.com www.rapsheets.com
Employment Verification – Some areas to address are job title, length of employment, reason for termination and rehire status.	All volunteers should be subject to this type of background check if they have an employment history or are currently employed and list this information on volunteer registration form. It is a reference source.	Contact companies and organizations listed on volunteer registration form.
Credit Reports – Credit/financial profile of applicant. Allowed under the Fair Credit Reporting Act for any permissible purpose, including volunteer screening.	Any position where volunteer will have access to funds (e.g., petty cash), financial information or valuables.	www.volunteerselect.com www.ussearch.com
Educational References and Diploma Verification	Professional volunteers (i.e., physicians, nurses, social workers, accountants)	Contact college/universities listed.
Professional License Certification	Mental health volunteers, physicians, nurses, physical therapists	Contact professional organizations listed if volunteer is performing services requiring certification.

*Editor's note: Web site addresses current as of 11/30/03.

Before conducting a background check, use permission forms to gain consent from the potential volunteer. Your request to sign the form can serve as another opportunity to review the standards and qualifications required for the position with the prospective volunteer. For a sample permission form, see Appendix 5C.

Reference checks are an integral part of any screening process. Be sure to follow up on references if they have been requested. Applicants do not always expect that their references will be checked. Do not assume that applicants only supply the names of people who will speak well of them.

TIPS

Sample Questions to Ask a Reference

- In what capacity have you known the volunteer and for how long?
- What strengths would this person bring to the volunteer position?
- How does this person handle frustration and criticism while on the job?
- Do you know any reason why this person should not be considered for a volunteer position?

IMPLEMENTING A SCREENING PROCESS

Notifying Potential Volunteers

Informing prospective volunteers that screening is part of the placement process helps avoid unwanted surprises for both the program and the volunteer. Be sure to mention the screening process in recruitment materials or in the volunteer information packet given to prospective volunteers. Advance notice prepares volunteers for the process. Knowing that the intake process requires an interview and reference check will give volunteers a sense of the seriousness with which your program approaches volunteer selection. It lets prospects know that becoming a volunteer is not an instantaneous process.

Providing advance information about specific screening requirements also allows prospective volunteer caregivers to self-select. For example, someone with a poor driving record probably will not volunteer for a position that requires a motor vehicle record check. Advance notification also streamlines the intake process for both volunteers and those conducting the interview. If the screening process includes confirming skill-based credentials, such as cardiopulmonary resuscitation (CPR) certification, mention this in volunteer recruitment materials. It saves time by encouraging volunteers to bring the certification to their intake meeting.

Remember, screening is meant to enhance, not inhibit, volunteer placement. Once a process is in place, you will find it minimizes delays in matching volunteers to volunteer positions.

TIPS

Checklist: What Volunteers Should Bring to the Interview

Create a check-off box listing items needed or covered during the volunteer intake. The box can appear on a flyer in the volunteer information packet and on the registration form. This checklist might include the following:

- ❑ Questions about the program
- ❑ CPR certification
- ❑ Names and contact information for three personal references
- ❑ Signed permission to conduct a background check, when appropriate (provided in the information packet)
- ❑ Copy of driver’s license and list of emergency contact numbers

The interview form can then include a corresponding series of check-off boxes to indicate that the materials were provided.

Managing Screening Information

Once the necessary information has been gathered in the screening process, what do you do with it? First of all, use it. Do not waste the time of screeners and prospective volunteers by gathering information that will not be used. If references are required, be sure to call them; don't simply file the names away. Do the same for questions that ask about permission to conduct a background check.

Second, establish in advance some criteria for reviewing the information and making decisions on whether or not to disqualify a prospective volunteer.

- Will any and all citations on the police record disqualify a volunteer?
- What types of offenses will disqualify someone from volunteering with *Faith in Action*?
- Does it vary depending on the volunteer position?
- Will there be a distinction made between arrests and convictions?

Establish a record keeping procedure and develop a central repository for information, so that the program maintains a clear history of screening decisions. Screening processes should include a review of program records, to see whether or not a prospective volunteer has applied to the program in the past.

When using information, protect the privacy of the prospective volunteer. Background checks, reference checks and related types of inquiries need to be confidential. If other volunteers are involved in the screening process, consider whether or not it is appropriate to have them review this information. Depending on circumstances, it may be better to retain the review process as a staff function, or to limit the involvement of volunteer screeners to a few highly experienced volunteers who have received additional training.

Protecting Privacy

- Make sure that volunteer databases are password-protected and keep documents in locked files.
- Establish a policy that limits access to volunteer files to people who have a legitimate need to know.
- When an individual is denied acceptance into the volunteer program, consider storing the details of the denial in a separate, more secure location. Information on the disqualification should be shared only on a need-to-know basis.

Once the complete profile has been reviewed, use your established criteria to make the decision whether or not to accept the volunteer into the program. Let the prospective volunteer know the decision as soon as possible after the process is completed. Share with the prospective volunteer any information that was used in arriving at the decision.

When a prospective volunteer has been disqualified, it is important to notify others involved in the program of the outcome of the decision, without giving unnecessary details. For instance, advise the interviewer and the supervisor of the specific project of the disqualification. Put a notification process in place to ensure that the disqualified individual cannot show up to volunteer in another area of the program.

CONDUCTING VOLUNTEER INTERVIEWS

The Interview Process

Selecting the right interviewer is the first of several steps that comprise the interview process. In general, the volunteer coordinator does the work of interviewing volunteers. Often, however, those who will be working directly with the volunteer (such as a volunteer team leader or congregational liaison) are also brought into the process. When recruiting interviewers, it is important to find people who can assess a volunteer’s abilities in relation not only to the advertised position but also to other positions within the organization.

When selecting an interviewer, look for someone who possesses the following:

- Wide knowledge of the organization and its programs
- Personal knowledge of the staff and their habits
- The ability to relate to diverse personality types
- The ability to talk easily with strangers
- The ability to listen well and hear "between the lines"
- Knowledge of nondirective interviewing techniques
- The ability to recruit and motivate and a commitment to the volunteer program and the organization
- The ability to empathize with people
- The ability to say no

The next step is choosing an appropriate interview site. Interview sites should be accessible and should provide volunteers with a sense of both privacy and comfort. Do not conduct interviews in public places or shared office space. Interviewers should schedule the interview so it will not be interrupted by other commitments.

Preparation is also important. Before the interview, take some time to prepare for the volunteer's arrival. The interviewer should have the following on hand:

- A selection of possible volunteer position descriptions and the qualifications required
- A list of questions relevant to each volunteer position
- The volunteer's completed registration form, with information on background and interests
- A list of open-ended questions that explore the volunteer's motivations
- Information and materials on the organization
- Details regarding the next scheduled volunteer training session

The interview itself is a give-and-take process. Use the beginning of the interview to build rapport and make the prospective volunteer feel welcome. The body of the interview will focus on exploring the volunteer's interests, discussing various positions and the requirements of the work, reviewing training opportunities and requirements and answering any questions the volunteer may have about *Faith in Action* or the volunteer program. Keep in mind that the interview is a tool for recruiting as well as screening. Be sure to explain why each volunteer position is important to the *Faith in Action* program and how it helps to meet care recipients' needs.

Interview Guidelines

Follow these guidelines for a thorough and successful interview:

1. Thank the prospective volunteer for his or her interest in the organization.
2. Let the volunteer know the purpose of the interview, which is to explore how the applicant and the organization can best work together in a way that benefits both parties.
3. Let the volunteer know the items to be covered in the interview: brief background of organization, the applicant's background, discussion of volunteer opportunities, next steps, etc.
4. Provide a two-minute overview of the program, if needed, and ask if the volunteer has questions.
5. Provide an explanation of the program's expectations. (Some of this may need to be covered after you have identified a specific position for the volunteer.)
6. Ask about the volunteer's general background. (You may already have some of this information from the volunteer registration form.)
7. Ask about the volunteer's interests and aspirations related to volunteering, e.g., what attracted him or her to the organization or specific volunteer position.
8. Ask about necessary skills, if needed.
9. Request necessary background information, such as credentials.
10. Ask the prospective volunteer any other questions that will help you place him or her in the right position.
11. Share with the volunteer a list of current volunteer opportunities. Ask if any are of particular interest.
12. Ask if the volunteer has any questions or concerns.
13. Agree on next steps.

TIPS

Streamline the Interview

When appropriate, streamline the steps in the interview process. For example, interviews for short-term or episodic volunteers can be shortened to a few minutes. For some group projects, such as corporate or faith groups, the interview may be conducted with one representative, instead of each individual volunteer from the group.

Following up is the final step in the interview process. Based on the volunteer's answers, gather the stakeholders involved and discuss where to place the volunteer and how best to use his or her abilities. This is also the time to follow up on references provided by the volunteer. Also, send a thank-you note to the prospective volunteer for donating the interview time to the organization. If you have other volunteers helping with the interview process, thank them as well.

Inappropriate Questions

Some questions are not appropriate for the interview. These include the following:

- Age
- Birthplace
- Height and weight
- Marital status
- National origin
- Religious affiliation
- Arrest record
- Race
- Sexual orientation
- Anything not directly related to the prospect's ability to perform the specific volunteer role under consideration

> ***Faith in Action* Non-Discrimination Policy**
>
> "The commitment of several diverse communities of faith is integral to the *Faith in Action* program's success. Proselytizing is prohibited. Individuals from any faith, or even with no religious affiliation at all, are eligible to be volunteers or care recipients, and no one can be denied participation on the basis of age, gender, race, or sexual orientation."

MATCHING VOLUNTEERS WITH APPROPRIATE POSITIONS

There are two basic approaches in volunteer screening. Either the volunteer coordinator determines the skills and interests of the prospective volunteer in order to assign the individual to an appropriate role or the volunteer has applied for a specific position and the screening process determines whether the individual meets the requirements.

Skills and Experience

When assessing a volunteer's skills and experience, look at what is on the registration form, but also note what is said and not said in the interview. If a particular skill is required for a position—for example, caregiving for people with Alzheimer's—take time to assess the volunteer's skill level. It might be helpful to prepare a few knowledge- or skill-based questions for the volunteer to answer as part of the interview process.

Do not wing it. Use the tools already at hand to assess the volunteer's skills and experience.

- Use the volunteer training chart discussed in Chapter 2 to assess the volunteer's qualifications or preparation for a given position.
- Use the written volunteer position description as a starting point for the interview. Does the volunteer understand everything listed in the description? Does the volunteer have the needed skills?
- Use the checklist provided in the volunteer registration and information kit. Has the volunteer brought all the items requested?

Recall that volunteer screening assesses (1) whether or not a volunteer already possesses the skills needed for an identified volunteer role, or (2) whether another role might be appropriate and interesting for the volunteer. In writing the volunteer position description for an identified volunteer role, you have already identified the skills needed by the volunteer to fulfill the tasks assigned to the position.

- Does the volunteer have the skills listed?
- Does the volunteer have skills that can be adapted to meet the position's requirements?
- Has the volunteer provided the certification or background information required?

If a specific position has not been identified for the volunteer, keep the following questions in mind when assessing the registration materials or interviewing the volunteer:

- Which volunteer positions are open?
- What are some of the program's unmet needs?
- What does the volunteer already know how to do?
- Do the applicant's skills match any open positions?
- Does the volunteer seem enthusiastic about assuming any of these roles?
- If the volunteer's skills do not match an open position, can he or she suggest ways to help meet the program's needs?

Training

Screening enables volunteer coordinators to determine what training is needed to help a volunteer complete the required tasks. Volunteer position descriptions, which are shared with prospective volunteers during the interview process, list the tasks required. Volunteers can work with the interviewer to clarify the skills they will need to fulfill these tasks. This information can be used to match a volunteer with training opportunities that already exist within the organization. For example, a new volunteer might be assigned to team with an experienced caregiver for a few months.

Using feedback provided by volunteers during the interview or from their registration form sets up a preliminary training list that identifies any training they will need in addition to the basic *Faith in Action* orientation. This will help both volunteers and the program keep track of developing skills. For more on training volunteers, see Chapter 6.

Supervision and Support

Use the training list described above as part of periodic volunteer performance appraisals. Volunteer coordinators can use the list to do the following:

- Review the list of duties with the volunteer.
- Note successes and shortfalls.
- Devise an action plan to further develop volunteer skills.
- Track areas of greater or lesser liability for the organization.
- Develop new training based on information gathered in interviews and from feedback sessions.
- Note services for which the program needs more volunteers or has a full supply of volunteers.
- Identify volunteers who might benefit from additional training or are capable of cross-training for different roles.

For more on volunteer supervision, see Chapter 7.

SCREENING AND PLACEMENT FOR GROUPS

Screening for Groups

Sometimes *Faith in Action* programs develop partnerships with specific groups of volunteers who are working together on a volunteer project to meet the goals of their employer, school, faith group or organization. Screening volunteers for group projects offers a particular challenge.

A quick and specific needs assessment for group projects will help determine the appropriate level of screening needed. Some types of group projects, such as delivering holiday baskets to family caregivers, may require only basic screening. Others, such as volunteers who help elderly persons fill out tax returns, may require a deeper screening regimen. Red flags include tasks that require specific training, access to confidential information and access to members of a vulnerable population. When assigning volunteer projects that bring volunteers in contact with vulnerable populations or sensitive information, it is best to rely on well-established partnerships and well-screened groups.

TIPS

How Much Screening Is Needed?

Conduct a short needs assessment of the volunteer projects you will be handling and focus your questions on security and liability. The answers to the following questions will help determine the level of volunteer screening required:

- Who are the beneficiaries of the volunteers' efforts?
- Will volunteers be working in the main offices with staff during working hours?
- Will they be working after regular hours?
- Will the volunteers have access to homes?
- Will they be working with vulnerable populations: children, frail elderly, people with disabilities?
- Will volunteers have access to confidential materials (e.g., care recipients' financial information or social security numbers)?
- Will the work require special skills?
- Are there special credentials needed? For example, volunteers helping with tax returns may need special training, but volunteers helping with shopping lists may not.
- Will volunteers be helping as part of a one-time event or as part of a long-term effort?

Screening procedures for groups need to be consistent. Develop policies that account for variations in position requirements. This will allow you to establish reasonable guidelines and timelines for the screening process. But be careful to avoid policies that may discriminate against prospective groups of volunteers.

You can also plan events in advance for which groups of volunteers will be most useful and appropriate. Establish a calendar of group events several months or a year in advance. This helps your partners in other agencies or businesses to select projects in plenty of time to meet your volunteer screening requirements. In general, when considering a group volunteer effort, try to work with established volunteer programs, such as faith groups or employee volunteer programs that already incorporate a volunteer screening process. If screening is not part of their programs, enlist the help of their volunteer leaders in the screening process. Have the volunteer leaders hand out the volunteer recruitment and registration materials. If these are organizations with which you have an established relationship, you can begin the process well in advance of the project. If the group's coordinator already has done background checks and credential confirmation, get copies of these materials (with the permission of the volunteers) and do random checks of the information. If the information is more than a year old, require that essential aspects of the process be updated, such as date-sensitive credentials for CPR skills, criminal background checks, etc. Also note that, as part of your partnership agreement with other organizations, you will need to establish who "owns" the event and whose will be the primary liability insurance listed.

Interviewing Groups

Interviewing large groups of people can be problematic. A first step is to interview the volunteer or group project coordinator from the organization with which your *Faith in Action* program will be partnering. If the partner organization's screening process is compatible with *Faith in Action's*, it may be possible to forgo one-on-one interviews. (See the above description of needs assessment to determine the level of screening needed.) Or you might consider incorporating the interview as part of a group orientation. During the orientation, cover the basic information provided to all volunteers: history of the organization, skills required and responsibilities of the volunteer and *Faith in Action*, etc. Clarify how *Faith in Action's* requirements differ from those of the partnering organization. Then allow time for a question and answer session. Prepare a list of questions to gather general information on skills and background from the volunteers—for example, "How many volunteers have worked with persons with HIV/AIDS?"

Placing Groups

Volunteer projects that require groups will probably be identified during your program's initial needs assessment. In placing groups, it is important to remember the main reason for placing any volunteer—how can these volunteers help further *Faith in Action's* mission? The purpose of involving volunteers is to increase the effectiveness of *Faith in Action*. Therefore, volunteer positions, even ones for which groups are appropriate, need to encompass tasks that serve the organization well. Before developing volunteer positions for groups, determine the administrative or caregiving needs the volunteer program plans to meet. (See Chapter 2 on how to turn your mission into action.)

As you identify activities that will further your program's mission, some may present themselves as appropriate for group action. For example, an obstacle to accomplishing the mission may be that few corporate neighbors understand that there is a need for *Faith in Action's* services in your community. A group project can be a way to establish a relationship with corporate neighbors. Planned as an annual event, the group project can raise the program's profile in the community, help new community members understand the daily needs of care recipients and demonstrate how volunteers with special skills can make a difference.

Appendix 5A

Sample: *Faith in Action* Volunteer Registration Form

Personal information:

Name:____________________________Phone (H):__________ (W):__________
Address:____________________________ Fax: ____________
E-mail:____________________________________
Date of birth (optional):______________________
Congregation affiliation (optional):______________________________________
Occupation:_________________________
Can you be contacted at your place of work? Yes No

Volunteer options:

___friendly visits	___yard work	___shopping/errands
___fund-raisers	___light housework	___writing letters/reading
___respite care	___minor home repairs	___telephone reassurance
___meal preparation	___public speaking	___escort/transportation
___help in *Faith in Action* office	___other:__________	___other:_______________

Placement preference:

Please check all that apply:
I can volunteer: ___once a week ___more than once a week ___as needed ___other

Time/Day	Mon.	Tues.	Wed.	Thurs.	Fri.	Sat.	Sun.
Morning							
Afternoon							
Evening							

Matching information:

General interests, skills, volunteer experience, languages and hobbies:
____
____
____

Do you smoke? ___yes ___no
Are you allergic to pets? ___yes ___no
I prefer to volunteer: ___wherever needed ___through my congregation only
List any special considerations for your placement (distance from home, preference for age or gender of care recipient)?_____________________________

What reservations, if any, do you have about volunteering with *Faith in Action*?
____
____

Screening information:

Do you have a valid driver's license? ___yes ___no

License number: ___________________________

Insurance company: _________________________

Policy number:__________________

Have you ever been convicted for violation of any laws, traffic or otherwise?

___yes ___no

If yes, please explain:____

Do you have any physical condition that may limit your volunteer activities?

___yes ___no

If yes, please describe:____

Emergency contact:

Name:________________________ Phone:__________ Relation:___________

References:

Please list three persons we may contact who are not family members. You may include employers, teachers, religious leaders or others whose relationship to you is more than a personal friend.

Name:_________________________ Phone:___________ Relation:__________

Address:____

____

Name:_________________________ Phone:___________ Relation:__________

Address:____

____

Name:_________________________ Phone:___________ Relation:__________

Address:____

____

I hereby give my consent for *Faith in Action* to contact my references.

_______________________________________ _________________

Signature of Volunteer Date

Appendix 5B

Sample: ***Faith in Action*** **Volunteer Agreement**

This agreement is intended to formalize the relationship between the program and the volunteers. The agreement should be clearly understood by both the program and the volunteers and be used as a way to ensure a productive and rewarding volunteer experience.

Faith in Action

We at *Faith in Action* agree to accept the services of ______________________ (volunteer name) and we commit to the following:

- To provide sufficient information, training and assistance for you to be able to meet the responsibilities of the position
- To ensure reasonable supervisory aid to you and to provide feedback on your performance
- To respect your skills, dignity and individual needs, and to do our best to adjust to these individual requirements
- To be receptive to any comments from you regarding ways in which we might mutually better accomplish our respective tasks
- To treat you as an equal partner with program staff, jointly responsible for accomplishment of the program's mission

Volunteer

I, ______________________________, agree to serve as a volunteer and commit to the following:

- To perform my volunteer duties to the best of my ability
- To adhere to *Faith in Action* policies and procedures, including record keeping requirements and confidentiality of program and client information
- To meet time and duty commitments, or to provide adequate notice so that alternate arrangements can be made
- To act at all times as a member of the team, responsible for accomplishing the mission of the program

Volunteer signature: ________________________________ Date: __________
Faith in Action Representative signature: ____________________Date: _____

Adapted with permission of Heritage Arts Publishing from Steve McCurley and Rick Lynch, *Volunteer Management: Mobilizing all the Resources of the* Community, 1996.

Appendix 5C

Sample: ***Faith in Action*** **Background Check Permission Form**

I hereby allow *Faith in Action* to perform a check of my background, including:

- ❑ Criminal records
- ❑ Driving records
- ❑ Employment verification/volunteer history
- ❑ Credit reports
- ❑ Educational/diploma verification
- ❑ Personal references

and other persons or sources as appropriate for the volunteer jobs in which I have expressed an interest.

I understand that I do not have to agree to this background check, but refusal to do so may exclude me from consideration for some types of volunteer positions, and that all such information collected during the check will be kept confidential.

I hereby also extend my permission to those individuals or organizations contacted for the purpose of this background check to give their full and honest evaluation of my suitability for the described volunteer work and such other information as they deem appropriate.

Signed______________________________________ Date________________

This document is adapted with permission from Steve McCurley and Rick Lynch, *Volunteer Management: Mobilizing all the Resources of the* Community, 1996.

Appendix 5D

Sample: ***Faith in Action*** **Volunteer Interview Form**

Date: ______________

Interviewer:____
Please circle: staff board member volunteer coalition member

Volunteer: ____
Phone: __________________________(W) E-mail: _______________________
__________________________(H)
Address:____
____

1. What attracted you to volunteer with this *Faith in Action* program?

____
____
____

2. What do you hope to experience or gain while volunteering here? What would make you feel you have been successful?

____
____
____

3. Please describe a previous volunteer experience or similar activity in working with others. What did you like most about this experience?

____
____
____

4. Describe your ideal supervisor. What type of supervision style do you prefer?

____
____
____

5. What skills and qualities do you feel you can contribute to *Faith in Action*?

____
____
____

6. Describe any fears or uncertainties you have about volunteering with *Faith in Action*.

____
____
____

7. Is there anything more you would like to know about *Faith in Action*?

____

____

____

Matching Interests:

Discuss the various opportunities available for volunteers at *Faith in Action*. List the activities of most interest to the volunteer.

1. ____

2. ____

3. ____

****

Interviewer Assessment

Please check the appropriate box to indicate your reactions to the statements at the left.

Statements:	Strongly Agree	Agree	Strongly Disagree	Disagree
This person enjoys working with others				
This person has a genuine interest in volunteering with *Faith in Action*				
This person clearly understand the responsibilities of a *Faith in Action* volunteer				
This person seems committed to the mission of *Faith in Action*				

Are there any additional concerns that the program director should consider when working with this volunteer? (physical limitations, fears, etc.)

____

____

____

Follow-up necessary:

_____ Recommend as volunteer for *Faith in Action*

_____ Suggest a follow-up interview with program director

_____ Do not recommend as a volunteer. Please explain:

____

____

____

____

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Volunteer Orientation and Training

6

OVERVIEW

Volunteer orientation and training are two ways to help your *Faith in Action* volunteers understand their roles in the program and develop the skills necessary to effectively serve the community. Comprehensive orientation and training programs give volunteers a sense of belonging and confidence to carry out their work, while helping supervisors and care recipients feel more comfortable with new volunteers. Orientation and training are also part of an overall risk management strategy for the organization.

Volunteer orientation sets a tone and helps volunteers to adapt more easily to the program surroundings. Orientations are an efficient way to discuss expectations and present general information about the program and policies that apply to all volunteers, regardless of the services they will be providing.

Volunteer training provides the position-specific skills, knowledge and guidelines that volunteers need to be successful in their volunteer roles. Training is a continuous process; as time goes on, new learning needs surface. In addition to keeping up with training needs, volunteer coordinators face numerous choices regarding who will deliver the training as well as how, when and where it will occur.

Designing and presenting orientation and training that meet the changing needs of your program and your volunteers are the focus of this chapter.

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PURPOSE OF VOLUNTEER ORIENTATION AND TRAINING

Recruitment

Volunteer orientation and training can be effective recruiting tools. Regularly scheduled orientation sessions that are easily accessible and conveniently scheduled can welcome members of the community who are interested in learning more about the program and its volunteer opportunities. Some volunteers may also see access to volunteer training in practical skills as a benefit that attracts them to *Faith in Action* programs. For example, some may appreciate the opportunity to learn more about Alzheimer's, HIV/AIDS or other information specific to the population served by the volunteer program.

Screening and Placement

A strong volunteer orientation program can supplement the volunteer screening process. Orientation affords potential volunteers an opportunity to screen themselves, through presentations on the various volunteer roles, program policies and position requirements. Training provides further opportunities for volunteers to practice the skills of a particular volunteer position and try it out before working directly with care recipients. Potential volunteers can then seek out positions that best suit their skills, interests and availability. This freedom to self-select increases volunteer retention and satisfaction.

TIPS

According to a study on the sustainability of *Faith in Action* programs conducted by Public/Private Ventures in 2003, programs that required pretraining for volunteers before serving clients were more likely to recruit needed volunteers than those programs that did not require pretraining. One explanation for the greater likelihood of meeting recruitment needs might be that volunteers are more willing to commit to a program that helps prepare them for their service responsibilities.

Risk Management

Volunteer training is an essential part of an integrated risk management program. Effective training builds the knowledge and skill level of volunteers and reduces the likelihood of low quality service. This helps to mitigate the risk to the care recipient, the program and the volunteer.

Orientation and training are among the best ways to prevent liability issues. Volunteers who receive minimal training, supervision and guidance are more likely to act in a way that is contrary to the intentions of the program. In some cases these actions may result in harm that the program could have avoided had it exercised greater care. A program that provides minimal or no direction to its volunteers and relies solely on their good judgment is placing itself at great risk.

Program Support

Training and orientation of new volunteers adds to their knowledge and skill levels and allows volunteer supervisors to utilize volunteers quickly and effectively. Supervisors and board members often feel more confident about the competency of volunteers who have received standard training. This can reduce barriers between supervisors and volunteers because they know that volunteers understand the program. Volunteer supervisors and board members can then offer better support for a high-quality volunteer program, especially when they are involved in providing the volunteer training.

Retention

Training increases retention by ensuring that volunteers are prepared for their responsibilities and giving them the confidence to take on their roles. Retaining volunteers is both an indicator of and a key to success in volunteer management. When volunteers keep coming back, they gain additional experience and further refine their skills. The retention of trained and seasoned volunteers reduces the amount of training needed and allows the volunteer coordinator more time to be creative and effective in carrying out the mission of the program.

IDENTIFYING TRAINING NEEDS

To create appropriate and useful training, it is important to identify the knowledge, skills and attitudes (KSAs) that a volunteer will need to be successful in a *Faith in Action* program. While volunteer coordinators should not expect volunteers to come with the specific knowledge needed to work in the program, they need not assume that volunteers have no relevant knowledge or skills. Volunteer coordinators should be sure to identify training needs rather than wants. The content of training sessions should be built to bridge the gaps between what volunteers already know and what more they will need to know in order to be successful.

TIPS

4 Steps to Identify Training Needs

Follow these steps to identify training needs for volunteers:

1. Review volunteer position descriptions.
2. Identify all knowledge, skills and attitudes needed to perform tasks outlined on position descriptions.

3. Assess volunteers' current KSAs and develop training based on that assessment.
4. Build training around the gaps in knowledge and skill levels.

Knowledge

Knowledge is specific information that volunteers need to function effectively. It provides awareness or understanding of issues, concerns and situations that the volunteer may face. At the least, orientation and training should inform volunteers about the following:

- History and mission of *Faith in Action*
- General characteristics and needs of the populations served (Alzheimer's, autism, mental illness, HIV/AIDS, etc.)
- Volunteer and program policies

Skills

Because volunteers perform caregiving roles in *Faith in Action* programs, there are many skills new volunteers may need in order to be successful. Skills training may need to include the following:

- Active listening
- Informal caregiving
- Transportation
- Shopping for others
- Financial management

Attitudes

Attitudes are beliefs and feelings involving the values and dispositions that allow people to act in certain ways. Volunteer attitudes should reflect the values and philosophies of *Faith in Action* and sensitivity to the populations served by the program. This is the hardest type of content to develop, but it is vitally important in preparing volunteers to be successful. Training topics may include the following:

- Understanding the program's care recipients
- *Faith in Action* philosophy of caring for one's neighbor
- Interfaith principles of service
- Logic of volunteer policies

DESIGNING TRAINING METHODS

A comprehensive training program identifies the knowledge, skills and attitudes that are essential for good job performance. It is practical, experiential and tailored to the individual needs of the volunteers being trained. Effective training methods teach volunteers how they are supposed to perform their particular assignment, what they are not supposed to do in their positions and what to do if an emergency or unforeseen situation arises.

Training can incorporate a variety of methods:

- Lecture—A program coordinator or guest speaker can provide a wealth of information in a lecture that contributes to the knowledge of potential volunteers, on topics such as characteristics of aging, mental illness, etc.
- Role-playing—This method gives potential volunteers the opportunity to practice important behaviors, such as sensitivity to care recipients, setting limits or introducing themselves to a new care recipient as a first-time friendly visitor.
- Panel discussions—Volunteers, care recipients and board members can provide an added perspective to your training with stories and personal testimonies.
- Videos—The "*Faith in Action*" video and "The Story of *Faith in Action*" video can introduce volunteers to their connection to the national volunteer program.

How Adults Learn

Context is vital in adult learning. The information presented in a training session must be related to the real lives of the learners. Adult learners need to grasp the relevance of the topic being presented and quickly find ways to connect exercises and activities to real life tasks in the volunteer workplace (and, in some cases, to their daily lives).

TIPS

Focusing on Context

- Ask participants to write down three ways volunteer training applies to them or how they will use this information in real life situations.
- Invite participants to share their ideas.
- Consider on-the-job training that provides immediate application of new skills and knowledge.
- Create training practice scenarios based on real-life examples of situations volunteers face.

Successful training for adults also incorporates these principles of adult learning:

- Build on participants' experience.
- Allow them to take responsibility for their own learning.
- Ensure understanding by reinforcing directions with handouts and overhead slides.
- Encourage involvement and discussion.
- Look to participants as resources in the classroom. Trainers should never assume they know more than the other adults in the training session.
- Highlight why and how participants can use the information presented.

EXERCISE

Applying Adult Learning Principles

Research and practice show that adult learning thrives when certain conditions exist. Use the following checklist to evaluate if you are creating these conditions in your training program:

Do I. . .

- ❑ Involve participants in the planning process?
- ❑ Create a conducive learning climate, both physically and psychologically?
- ❑ Focus on real world problems and immediate needs?
- ❑ Encourage participants to share resources and knowledge?
- ❑ Build upon participants' experience and what they already know?
- ❑ Make sure the learning process is active and engaging?
- ❑ Take different learning styles into account?
- ❑ Emphasize how participants can later apply what they have learned to everyday situations?
- ❑ Treat participants with respect?

How Young People Learn

Proper orientation and training is essential in providing meaningful service experiences for young people. Young volunteers have varied interests, and it may be difficult to get them to stay attentive. Trainers must ensure success for everyone by helping young volunteers understand the purpose of the work they are doing and, most importantly, by treating them as young adults.

TIPS

Tips for Training Young People (and the Young At Heart)

- Make it fun (use games when appropriate).
- Provide food or refreshments.
- Involve other people in the training and orientation.

- Involve participants in doing, not just listening.
- Focus on providing two or three key messages or skills. Do not try to present too much information too fast.
- Provide opportunities for participants to talk, interact and share their own insights and knowledge.
- Use a variety of media and senses to get the message across.
- Speak in terms that people will understand. Explain common terms, acronyms and other internal jargon.
- Provide opportunities to practice through role-playing.
- Provide written material that volunteers can refer to later.
- Allow people to ask questions. Some things that may be obvious to you may not be obvious to them.

Training Manuals

Training manuals help introduce and reinforce vital information, such as what to do, what not to do, whom to report to and how to handle a crisis or grievance. The manual also provides a written record and reference for the training and thus can serve several important purposes:

- An ongoing resource that volunteers can refer to
- Help for visual learners to stay connected to the trainer
- A source for further details that the trainer may not need to cover in the training session
- Risk management protection (volunteers "have it in writing")

Topics covered in the manual may include many of the same materials and forms contained in the volunteer handbook (as listed in Appendix 7D at the end of Chapter 7), as well as the following:

- Training agenda
- Training objectives
- Knowledge-based content
- Skill-based content
- Attitude-based content
- Additional resources for volunteers who want more information
- Training evaluation form

Quick Manual Updates

To make quick updates easier, consider the following formats:

- Binders and folders that allow for new information to be inserted
- Dated information to help ensure that volunteers have the most current version of policies, rosters, and so forth

DELIVERING TRAINING

Who Delivers Training

Today's volunteer coordinator does not have to shoulder the role of trainer alone. Volunteer supervisors or faith group coordinators can conduct program-specific training sessions. Experienced volunteers can provide credible, valuable insight into the practical skills new volunteers need. In some cases, a *Faith in Action* program may collaborate with another local agency to sponsor ongoing training specific to the program's focus of care. Or staff members at other community agencies and programs can offer specialized training in areas that may be outside the *Faith in Action* program focus or expertise.

Responsibility for conducting training sessions can draw on individuals with strong training skills and build the skills of experienced volunteers or staff who are looking for new challenges.

Where to Deliver Training

Orientation can be held at the program site to make new volunteers feel welcome to the program. For example, if a *Faith in Action* program is hosted at a local place of worship, then the orientation could be held at that site. This is a good way to get coalition members more involved in the program and may even afford opportunities for further recruitment. Wherever it is held, the orientation will be most effective when done in a quiet location with minimal interruptions.

Training can be held in community settings such as a local university or community college, community center, library or school, if more space is needed or a classroom setting is desired. Training can also be provided via the Internet. The style and method of training affects the training location. Formal groups may meet in a classroom, informal one-on-one training can be conducted at a local cafe over a cup of coffee and self-study training can occur in the home.

When to Deliver Training

Training begins the moment a volunteer enters the door. When a volunteer reports to work, they will experience a high level of anticipation that relates to trying something new and exciting. There will be unanswered questions about whether volunteers will feel wanted, needed and appreciated. By providing a general orientation, volunteer coordinators can address questions immediately, begin communication and show volunteers that they are taken seriously and that their success is important to the program.

Training sessions are typically scheduled after an orientation, once a volunteer has been placed within a program, but before the volunteer begins to work. This way volunteers can receive training tailored to the tasks specific to their volunteer responsibilities.

TIPS

Timing Training

- For working adults or young people in school, schedule training after 3:00 P.M. or after business hours.
- Find ways to keep training as short as possible, allowing enough time to provide only relevant information.
- Schedule training between 10:00 A.M. and 3:00 P.M. for seniors, who may not want to drive during rush hours or after dark.
- Ask volunteers about early morning training. Breakfast training for 90 minutes may be best for some people.
- Consider weekend training for parents and provide an activity or childcare service for children. This can be coordinated and staffed by existing volunteers.
- Remember to consider transportation issues when scheduling training for young people. How will they get to and from the training site? Consider scheduling a training session at the local school after classes.
- Avoid scheduling training when volunteers may be overburdened with commitments, such as during the holiday season or summer vacation.

Appendix 6A

Sample: Agenda for Volunteer Training Session

Time	Recommended Topic and Action
10 minutes	**Welcome** Welcome volunteers to the program.
5 minutes	**Introduction** Include volunteer supervisors, board members, coalition members, volunteers and possibly care recipients. In an icebreaker exercise, pair the new volunteers and supervisors or board members, and have one interview and introduce the other, using information they learned.
10 minutes	**Volunteer Handbook** Distribute the volunteer handbook. Review the categories. Explain that they will receive revisions as they are published. (The handbook allows visual learners to follow along, and provides a reference when discussing policies and detailed information.)
15 minutes	**Program History and Mission** Understanding the history and mission of the program is essential to volunteers. If the history of the program is lengthy, just give the significant highlights. Consider showing excerpts from the *Faith in Action* video.
20 minutes	**Volunteering History and Opportunities** Participants need to understand how their volunteer assignments help to accomplish the program's mission. The overview of opportunities should cover the variety of volunteer assignments within the program. If possible, volunteer supervisors and/or other volunteers should describe these opportunities.
5 minutes	**Performance Expectations** This segment of the orientation is crucial to articulating expectations of performance and behavior. The discussion needs to be clear and straightforward. It is particularly important to include a discussion about volunteer responsibilities, public visibility and how volunteers will be evaluated. Describe the program's policies on prohibited behaviors, such as proselytizing, drug/alcohol use and sexual harassment. Emphasize that prohibited behaviors and the consequences apply to all volunteers. Include what volunteers can expect from the program. Volunteers need to know that the program is committed to providing them support, and that they are valued as full *Faith in Action* members of the team. Review the grievance process for volunteers on issues related to assignments or working conditions.
15 minutes	**Role-Play** Experienced volunteers can lead a role-play exercise that gives participants the opportunity to practice behaviors such as first-time introductions to a care recipient.
10 minutes	**Volunteer Placement Process**
5 minutes	**Questions & Answers**

Volunteer Supervision

7

OVERVIEW

FAITH
IN ACTION

Volunteer coordinators function in many ways as human resource directors. But just as no one expects the human resources director to directly supervise every employee in the company, the volunteer coordinator cannot be expected to supervise all the volunteers in the organization, especially when volunteers may number in the hundreds.

Nonetheless, effective supervision is essential to ensure the quality of *Faith in Action* programs. Well-supervised volunteers know that their work is valued and supported by the program, so they will be more likely to stay involved and grow with the organization.

One of the difficult challenges for *Faith in Action* programs is that the small paid staff may seem to be the only option for volunteer supervision. Fortunately, there are several other options for creating a structure to adequately supervise and maintain effective communication with every volunteer.

This chapter reviews some of these options and provides guidance for developing and supporting volunteers in supervisory positions. It also presents the elements of effective supervision and shows how to keep volunteers active, engaged and on track.

Chapter 7: Volunteer Supervision

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IMPORTANCE OF VOLUNTEER SUPERVISION

A well-designed *Faith in Action* volunteer program uses formal volunteer supervision to ensure that volunteers are providing high-quality services and that these services are helping the program meet identified community needs.

Volunteers who receive feedback about their work are more likely to provide better service and to abide by the program's policies and procedures. Understanding the supervision needs of volunteers and supervision styles of volunteer supervisors can help match volunteers with a complementary staff or volunteer supervisor. Well-managed volunteers are also more likely to stay with the program, as they see their skills being utilized and feel supported in their efforts. Supervision can also serve to verify that the volunteer has been placed correctly and, if not, to guide reassignment of the volunteer to a more appropriate position before the volunteer becomes frustrated and leaves.

TIPS

Quarterly supervision was identified as an important strategy for volunteer management in a recent study of sustainability of *Faith in Action* programs conducted by Public/Private Ventures. Regular contact with volunteers gives program staff the opportunity to bond with volunteers and develop stronger communication with them. Consider implementing at least quarterly supervision which was shown to be a consistent strategy used among *Faith in Action* programs who retained a core group of their volunteers for at least a year.

VOLUNTEER SUPERVISION MODELS

Within any organization there are a number of options for distributing the responsibility for volunteer supervision. Staff, congregational coordinators, team leaders, experienced volunteers, interns and other service program participants may all get involved in supervising volunteers.

Staff

It is not unusual for *Faith in Action* programs to have only a few paid staff members, so at some point everyone will be involved in supervising volunteers. Whether it is the main focus of the job (as in the case of a paid volunteer coordinator) or one responsibility among many (as with the program director), supervising volunteers is a necessity for staff of *Faith in Action* programs.

Because staff will be expected to supervise volunteers, the responsibilities of volunteer supervision should be included in their job descriptions. Volunteer supervision experience can be factored in during recruitment and hiring of new staff and offering training in volunteer supervision will ensure that staff have the skills needed to perform these tasks well. When it comes time for staff members' annual reviews, volunteer supervision should be part of the performance appraisal.

Volunteer Coordinator

Although the volunteer coordinator has overall responsibility for ensuring that the volunteer program is well run, it is unreasonable to expect one individual to personally supervise every volunteer. It is likely that the volunteer coordinator will directly supervise some volunteers, particularly those involved in recruitment, training, team leadership or volunteer supervision. The volunteer coordinator usually juggles these duties with other job responsibilities, such as coalition building, fund raising and office administration. It is therefore important for volunteer coordinators to delegate some responsibility for direct volunteer supervision to others; this is especially true for part-time volunteer coordinators.

Congregational Coordinators

Some coalition members have a congregational coordinator, a volunteer who organizes the members of the congregation to serve as volunteers for the *Faith in Action* program. The congregational coordinator serves as the supervisor for congregational volunteers, handling communication, scheduling and supervision. The congregation may have volunteers working in groups with team leaders in several areas, with the congregational coordinator supervising all of them. (See Figure 1.)

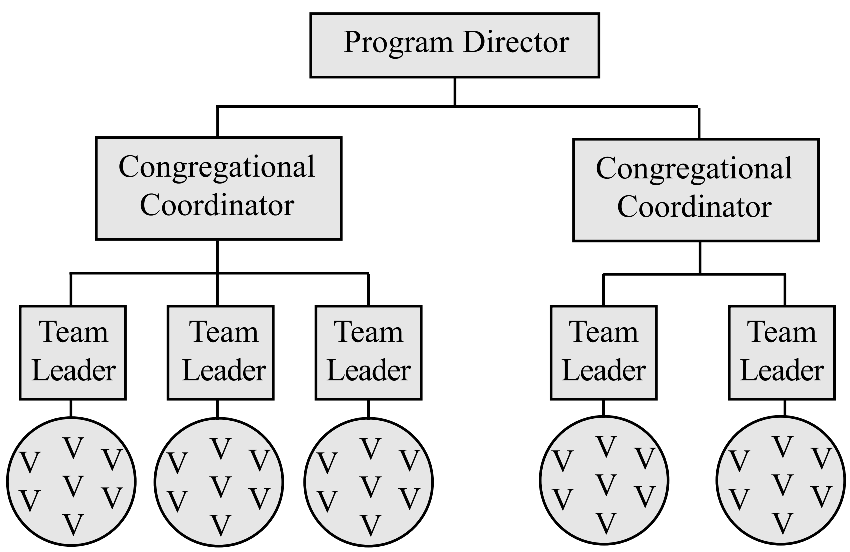

Figure 1: Example of volunteer supervision structure using congregational coordinators and volunteer team leaders to supervise volunteers.

For an example of a position description for a congregational coordinator, see Appendix 2H at the end of Chapter 2.

Interns and Other Service Program Participants

Several programs provide a stipend (financial compensation) or some other reward for participating in community service, for example:

- College internships and courses for which students receive college credit for their service
- National Service Programs such as AmeriCorps, VISTA and Retired and Senior Volunteer Program (RSVP)
- Federal Work-Study programs that allow college students to work for community nonprofits for pay or tuition reimbursement

These programs can be a great source of talent for any volunteer program. Because the participants generally make a substantial commitment of time, they can be good candidates to serve as volunteer supervisors or even as volunteer coordinators. For more information on these programs, see Appendix 7A at the end of this chapter.

Volunteers as Supervisors

Experienced volunteers can also serve as volunteer supervisors, providing direct and real-time supervision, coaching, support and feedback at regular intervals. Some programs organize their volunteers into groups of 8-12, assigning a volunteer team leader for each team. The team leader provides supervision to members of the volunteer team, often during monthly meetings, when team members gather for informational updates, support and a chance to socialize.

Figure 2 shows an example of a volunteer supervision structure that utilizes volunteers to supervise other volunteers. Volunteer supervisors and care team leaders can be experienced volunteers who may provide direct service in addition to supervising fellow volunteers or team members.

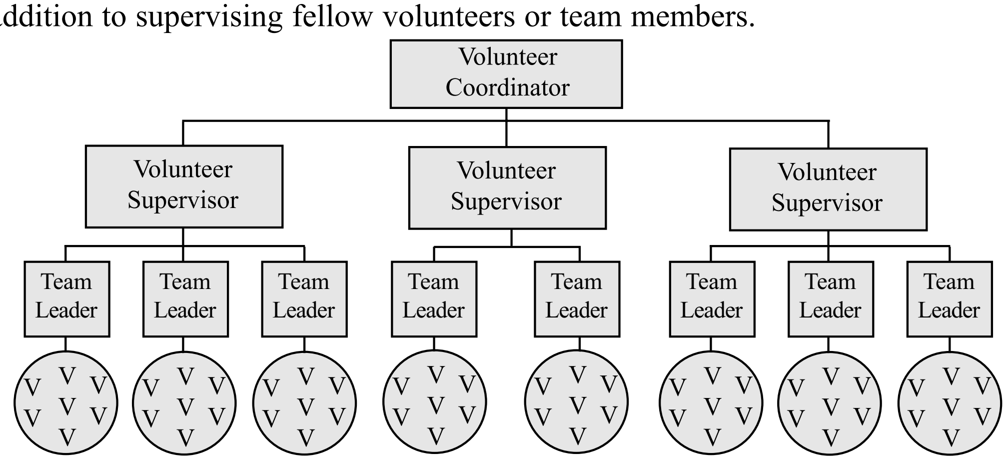

Figure 2: Example of volunteer supervision structure, using volunteer team leaders to supervise volunteers.

In this model, there is a structure by which volunteers report through a series of supervisors to the volunteer coordinator. The volunteer coordinator directly supervises a small number of volunteer supervisors, who in turn supervise the volunteer care team leaders. The role of the volunteer coordinator is to provide high-level direction and problem solving for difficult situations and to motivate and reward those who volunteer with the program.

Volunteer supervisors need to be carefully selected, as they will have far-reaching impact on the volunteer program. These are some things to look for in potential volunteer supervisors:

- Experience in the volunteer role to be supervised
- Experience in managing others, perhaps in their paid employment
- Good listening skills
- Ability to follow through
- Good communication skills
- Sensitivity to others

Of course, good volunteer supervisors will not simply appear at your doorstep ready to take over. They will need some preparation for the role of a supervisor.

ASSIGNING AND TRAINING VOLUNTEER SUPERVISORS

Questions to Ask

As with the creation of any volunteer position, the best place to start is by determining the program's needs. There are several questions to explore:

- Which groups of volunteers are in need of supervision that could be provided by another volunteer?
- What is the most logical way to divide the supervisory responsibilities?
- How many volunteers will each supervisor oversee?
- What types of volunteers will be supervised by one person?
- Will the volunteers work directly with the supervisor, or will the supervision be done remotely?

Once this information has been collected, a position description for the volunteer supervisor can be drafted. See Appendix 7B for an example of a position description for a team leader.

Steps to Take

Once you have outlined the supervision structure and crafted the position description, the process of recruiting and selecting volunteer supervisors can begin. Here are some steps to building a volunteer supervision structure:

1. Determine how many volunteer supervisors you need and how you will use them.

   A volunteer supervisor can generally be expected to supervise about 8 to 15 volunteers, depending on the type of volunteer work. In cases where all the volunteers are working simultaneously (as in a team of respite volunteers), it is probably best to keep the number small. In programs where the volunteers are taking turns filling shifts (as in a meal delivery program), the number of volunteers supervised by one person can be larger.
2. Consider who among your experienced volunteers might make a good volunteer supervisor.

   Look at past performance in the volunteer role as well as skills and experience the person may have gained outside the *Faith in Action* program. Someone who manages staff or is a team leader in their paid work might be a good volunteer supervisor.
3. Approach possible candidates individually with a personal request to consider serving as a supervisor.

   Highlight the opportunities for growth and the new challenges that being a supervisor will provide, but be honest about what you are asking the person to do. Point out their special skills that would make them well suited for a supervisory role.
4. Create a system of support for your supervisors.

   Get volunteer supervisors off to a good start with training to build their understanding and skills for their new role. Set up a schedule of regular meetings for your volunteer supervisors, so you can provide them with the support and supervision they need—once a month at least. Find out who needs additional volunteers on their team and recruit on their behalf. Maintain regular communication by passing along information on program changes, articles related to caregiving, etc.
5. Plan for the future.

   Develop a system for grooming new supervisors so you will be prepared for future program expansion or the departure of a volunteer supervisor. Create a list of current volunteers who might make good supervisors, and approach them to see if they would consider a future "promotion." That way, when an opening becomes available, you will be able to fill it more quickly. Start out new supervisors by having them serve as assistant supervisors or co-leaders of a team. Once they get some experience, they will be ready to take on their own groups of volunteers.

Identifying Supervisors' Training Needs

As discussed in Chapter 6, good training is designed to deliver three things that learners need to perform their roles effectively: knowledge, skills and attitudes (KSAs).

Volunteer supervisors will need training in two areas: the KSAs needed in the volunteer positions they are supervising and the KSAs they need to effectively supervise these volunteers. The first area of KSAs can be determined by reviewing the position description for the volunteers to be supervised. The second area will be determined by the position description for the volunteer supervisor.

Below are some examples of KSAs that might be important for volunteer supervisors:

Knowledge

- What services are needed
- How to fulfill needs effectively (the role of the volunteer)
- Program policies and procedures
- Resources to support the work of the volunteers
- Examples of how various situations have been handled in the past

Skills

- Proficiency in performing the volunteer work
- Good listening skills
- Ability to solve problems

Attitudes

- Belief in the ability of volunteers to deliver high quality service to care recipients, given the right training and supervision
- Nonjudgmental approach
- Openness to differences

Designing and Delivering Training

Because programs typically have a small number of volunteer supervisors and because new supervisors may come on board one at a time, training of new volunteer supervisors is often done individually or in small groups. The training can be offered as needed, whenever new supervisors begin their duties. This training is often done jointly by the volunteer coordinator and an experienced volunteer or a staff member who works directly in that particular program area, blending service delivery experience with volunteer management expertise. For more information on how to develop an effective training program, see Chapter 6.

BUILDING UNDERSTANDING AND COLLABORATION

Successful volunteer programs work to create an empowering environment for both staff and volunteers to work well together as a team. By engaging volunteers in decision-making, increasing staff and volunteer teamwork and sharing success stories, Volunteer managers can reap these benefits of strong volunteer-staff relationships:

- Higher quality work
- More trust between volunteers and staff
- Higher likelihood of using each other as a resource
- Less territoriality
- Greater willingness to work together

Engaging Volunteers in Planning and Decision Making

Volunteers feel more empowered when they participate fully in the development and operation of the *Faith in Action* volunteer program. Volunteers in leadership positions may find it difficult to feel supportive or trusting of a program in which they do not share decision-making.

There are several key elements for engaging volunteers in decision making:

- Volunteer involvement is central to the mission of *Faith in Action*. When a local program is being developed or expanded, volunteers should be fully involved in discussing the program and determining the rationale for the involvement of volunteers. They should be allowed to consider the appropriateness of volunteers and their place in the organizational design and be given time to develop their own philosophical beliefs regarding the involvement of volunteers.
- Volunteers in leadership positions should also be allowed to discuss their concerns and fears regarding the use of volunteers. They may have legitimate concerns regarding quality of service, liability, organizational readiness or even their own ability to work with volunteers. These perceived difficulties will become real barriers to creating a strong volunteer program unless they are brought to the surface and addressed.
- Volunteers in leadership positions should participate fully in all key aspects of volunteer program operations, including volunteer position design, interviewing and selection, training, supervision and recognition. The more volunteers are involved in designing and developing the volunteer program, the more likely the program will meet their needs and serve its intended purposes.
- One of the greatest barriers to volunteer effectiveness is the simple lack of knowledge and experience in volunteer management on the part of

staff and volunteers. Managing volunteers is not the same as managing paid staff, and untrained supervisors cannot be expected to know how to work effectively with volunteers or think creatively about volunteer involvement.

- Volunteer supervisors should participate equally in monitoring the success of the volunteer program. They should receive information about how volunteers are contributing to the program's mission and become involved in deciding how volunteers can continue to contribute most effectively. They should also be rewarded for their part in enabling volunteer involvement.

Increasing Teamwork

As volunteers emerge to provide supervision and support in much the same way that paid staff do, volunteers and staff must work together to accomplish the mission of the program. To be successful, it is important to encourage teamwork and allow for reasonable and efficient allocation of the workload.

Teams benefit when they possess the following:

- A shared goal or mission to accomplish
- Common values about the program and approaches to achieving the mission
- Mutual respect for the abilities and contributions of other members
- A belief or trust that other members of the team will support them
- A sense of interdependence, a feeling that individual weaknesses are compensated for by the strengths of other members of the team

Volunteer managers can strengthen the sense of teamwork among volunteers in the following ways:

- Create a common understanding of what volunteers are trying to accomplish and relate all activities back to the program's mission
- Provide opportunities for volunteers to consider and discuss the values of the program and find ways to express these values in action
- Eliminate irrelevant boundaries between volunteers, especially those that create different status levels
- Facilitate accountability of volunteers by providing feedback and recognition of their performance and accomplishments
- Watch out for inadvertent actions that make volunteers feel excluded or ignored, such as neglecting to invite key volunteers to planning meetings
- Identify the unique strengths of volunteers and then divide the work in such a way that responsibilities are allocated rationally based on ability

Sharing Success Stories

Stories can be powerful ways to capture and pass along important messages about complex situations. Programs that are effective in involving volunteers frame the culture of the program by selecting or creating stories about the contributions of volunteers. These stories serve to demonstrate the commitment and reliability of volunteers, as well as their basic humanity. They illustrate the potential of volunteers to help the program achieve its mission.

> "One good story is worth a thousand statistics."

A program that does not tell stories about volunteers—where staff cannot remember specific occasions when volunteers have contributed—is a program in which volunteers do not truly have a place in the culture. (See the section on "Recruiting through Recognition" in Chapter 8 for an example of an "Evening of Stories" hosted by one *Faith in Action* program.)

TIPS

Places to Share Success Stories

- Newsletters
- Bulletin boards
- Program meetings
- Board or coalition meetings
- Awards programs
- Annual report
- Reports to funders
- Community media
- Congregational bulletins and newsletters
- Presentations to civic groups

Conveying Clear Expectations

Volunteers might as well be working blindfolded if they are trying to do their jobs without being clear on their goals or roles, how the job should be done or what is and is not allowed. Thus, defining and communicating clear expectations to volunteers is critical to success.

There are three main areas in which volunteers need clarity: organizational and program policies that affect them, volunteers' responsibilities to the program and the program's responsibilities to volunteers. Vital information and guidance in each of these areas is conveyed to volunteers in a number of ways:

Organizational and Program Policies

- Confidentiality policy
- Reporting procedures
- Home visit protocols
- Diversity policy
- Program services
- Communication with program liaison
- Crisis plan

Volunteer Responsibilities

- Volunteer position description and responsibilities
- Prohibited or inappropriate volunteer conduct
- Absences or late policy
- Volunteer training requirements
- Policies about proselytizing

Program Responsibilities to Volunteers

- Volunteer supervision
- Appropriate training
- Support network (care team)
- Providing access to additional resources to help care recipients
- Evaluation and feedback process
- Recognition systems
- Volunteer grievance procedures
- Systems for volunteer input

Communicating Effectively

To effectively communicate expectations to volunteers, explain expectations verbally and face-to-face whenever possible. Do not simply hand volunteers piles of paper. Covering only those items that are relevant to the volunteer will help to cut down on confusion and overload. Most importantly, create a culture that encourages questions, so that volunteers feel free to clarify instructions and express their concerns when necessary.

There are a variety of channels you can use to communicate effectively with volunteers about their role in *Faith in Action* and about the work that needs to be done. These are a few methods and materials that are commonly used to make sure volunteers understand what is expected of them:

- Caregiver's Bill of Rights (see box at the end of this chapter)
- Volunteer handbook (see Appendix 7C)

- Volunteer training (see Chapter 6)
- Volunteer position descriptions (see Chapter 2)
- Regular meetings
- Monthly newsletters

Encouraging Volunteer Activity Reporting

From a *Faith in Action* program in Illinois:

To effectively track volunteer activities, the volunteers use a Volunteer Contact Record form to record their activities. When mailing out new forms to volunteers each month, the program director sends along an inspirational poem, story or cartoon to lift their spirits. This has really increased the number of completed forms received each month. To make things user-friendly, volunteers can send their information in by mail, fax or e-mail or even drop it off in person.

GUIDING VOLUNTEERS

Guiding volunteers involves giving them the instructions, direction, feedback and information they need to perform well in their volunteer roles. Principles for effective volunteer guidance come from the fields of human resource management and volunteer management.

- Take care of the person, not the task. If the supervisor takes care of the volunteer, the volunteer will take care of the task. Volunteers who feel the support and guidance of a caring supervisor are likely to perform at their best.
- Provide guidance in a way that works for the volunteer, not the way the supervisor thinks is right. This means that the supervisor needs to learn to use different guidance strategies for different people. Not everyone responds to the same strategy, so an effective supervisor needs to have several strategies to draw from.
- Support, do not control, volunteer efforts. Control stifles enthusiasm. Guiding volunteers is about providing direction and resources, not dictating each step of the work. This means that the supervisor may need to let go of control over how some things are done.

Taking Care of the Person, Not the Task

Ensuring that volunteers' needs are met will go a long way to making them feel comfortable and welcome in the program. Here is a long list of things supervisors can do to ensure that volunteers will feel "taken care of."

- Provide tangible benefits to volunteers, such as refreshments, a comfortable setting or appropriate supplies for the task at hand.
- Provide a physically safe environment.
- Recognize and welcome volunteers' personal interests and motivations for volunteering, such as gaining new skills or meeting new people.
- Provide opportunities for meeting and socializing with others.
- Create opportunities for volunteers to answer their "call" to serve.
- Encourage activities that foster relationships, such as retreats, brainstorming sessions, etc.
- Integrate new volunteers into existing teams and groups.
- Model friendliness and personal contact by recognizing birthdays or volunteer service anniversaries.
- Establish a central space for relaxed socializing.
- Discourage cliques that exclude others.
- Help people see the vision of your *Faith in Action* program.
- Create symbols of belonging, such as *Faith in Action* logos, pins, T-shirts and certificates.
- Assign an experienced volunteer to help new volunteers.
- Praise frequently and honestly.
- Recognize volunteers in front of others.
- Publish feature articles in newsletters or local newspapers about the good work of volunteers.
- Document volunteers' accomplishments and send copies to significant others.
- Remind volunteers of the difference they make.
- Give people the opportunity to use their gifts.
- Encourage volunteers to be creative and explore new horizons.
- Allow volunteers the freedom to take risks.
- Utilize volunteers as advisors, visionaries and problem solvers.
- Be prepared to adjust as volunteers experience "growth spurts."
- Understand that volunteers tend to be change agents and challenge the status quo.
- Respect volunteers' needs for independence along with their desire for interdependence.

Adapted from Sue Vineyard, *Secrets of Motivation: How to Get and Keep Volunteers and Paid Staff*, 1991.

Spirit Nights Refresh Volunteers

From a *Faith in Action* program in Louisiana:

The program offers "Spirit Night" three times a year to assist with volunteer retention. The evening program starts with an interfaith worship service followed by a speaker focused on renewal and affirmation. Hands-on volunteer activities are included, and the evening ends with refreshments of all sorts (potluck style) and fellowship. The Spirit Night allows people from various faiths to share one focus and one vision for the collaborative work. The programming focus on renewal helps restore volunteers, prevent burnout and affirm the program's mission.

Fitting Supervision Strategies to Volunteer Personalities

One way to determine the best strategies for supervising volunteers is to consider the key volunteer personalities mentioned in several other chapters: Achiever, Affiliator and Empowerer. To pinpoint what motivates your volunteers, take some time during a training session or team meeting and ask volunteers to complete the self-assessment test in Appendix 7D. Use the key in Appendix 7E to analyze their answers.

Of course, each volunteer should be supervised as an individual. But it can be helpful to consider the needs and preferences of these personality types, in order to gain additional insight into effective supervision strategies.

Supervising Achievers

- Be very clear about what needs to be done, why, when and where.
- Understand that their goal is to attain success through measured excellence or improved performance.
- Tell them how and when success will be measured.
- Offer checkpoints along the way to help them know they are on the right path.
- Give them something concrete and measurable to work on.
- Understand that they can work independently—they do not need companionship.
- Reward them by documenting and communicating their success in measurable terms, such as letters to their bosses recognizing the exact number of service hours they spent providing respite care to the family of a child with a disability.
- Offer them challenges that will stimulate their desire for measurable achievement, especially those that are "first" or "biggest."
- Involve them in designing processes to achieve goals, such as step-by-step plans to get from point A to point B.

Supervising Affiliators

- Establish a personal relationship with them.
- Express appreciation for them personally.
- Give them opportunities to interact with others.
- Recognize them in front of their peers.
- Help them feel included.

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- Recruit them to assignments by talking about the people who will be served.
- Personalize recognition efforts.
- Learn about their families, pets or hobbies and show genuine interest in things that matter to them.
- Understand that the ability to interact with others as they work is not a waste of time for these volunteers, but insurance that they will stay involved.

Supervising Empowerers

- Let them follow their own plans after giving them their assignments and any information and parameters.
- Give them access to anyone and any information they need.
- Give them challenging work, then step back!
- Ensure that they see the vision of what's to be done.
- Allow them to take risks.
- Reward them publicly.
- Give them a title that commands respect.
- Involve them in planning that requires advocacy and political savvy.
- Give them responsibility and authority.
- Ensure that they remain sensitive to others.
- Recognize and encourage their activities.
- Channel their enthusiasm.
- Allow them to move from one position to another. They may become bored easily if called on to do the same thing over and over again; yet they may also feel a sense of ownership of projects they have created.
- Understand their extreme enthusiasm for conceiving and managing an original event or program and their subsequent lack of enthusiasm at having to maintain the effort. They are start-up leaders, not maintenance managers.

Supporting Volunteers

Clearly, supervising volunteers is not about control, but about support. Using an approach of supportive supervision will help your volunteers to be more productive and effective.

Supporting volunteers can take many forms:

- Help them find the volunteer work that's right for them. For many volunteers, this means helping them answer their call to service.
- Make sure they have the knowledge and skills necessary to be successful.
- Create the conditions that encourage volunteers to want to do the work.

- Empower volunteers to make good decisions and take appropriate independent actions.
- Provide resources, advice and assistance, when needed.

Giving volunteers some autonomy over how they do their work does not mean handing over complete responsibility for the program. Instead, the supervisor can define the amount of authority the volunteers will have in deciding how to carry out their responsibilities. Four levels of authority can be defined: self-assignment, self-assignment with reporting, self-assignment with prior notification and no authority for self-assignment.

Self-Assignment

At this level of authority, the volunteer has a high degree of autonomy. The volunteer decides what to do and how to do it, without needing to inform the volunteer supervisor of every activity undertaken. An example of this level of control might be a volunteer receptionist. This volunteer comes in for scheduled shifts, greets visitors, answers the phones, etc., but only notifies the supervisor if there is a problem the volunteer cannot handle.

Self-Assignment with Reporting

At this level of authority, the volunteer makes regular progress reports. As in the previous level, the volunteer decides what to do and does it, but at some point (with frequency determined by the supervisor) the volunteer tells the supervisor what was done, either in writing or verbally, formally or informally. An example of this level of control might be a friendly visitor, who discusses with the care recipient how often and how long to visit, but does not need to notify the supervisor about each visit. At the end of the month, the volunteer submits a report summarizing all activities with the care recipient.

Self-Assignment with Prior Notification

At this level, the volunteer still decides what to do, but checks with the supervisor before taking action. The frequency of notification may vary from daily check-in to a monthly or quarterly plan of action. As with the previous level, volunteers at this level should provide regular progress reports. Some examples of volunteers who operate at this level of control are transportation and youth volunteers.

No Authority for Self-Assignment

At this level, the volunteer has virtually no control over the work assignment but just follows direction. This approach to management requires more time and energy on the part of the supervisor and limits creative input from the volunteer.

This approach is typically appropriate for new volunteers and short-term volunteers. However, as volunteers gain experience, they will probably perform better with a higher degree of self-assignment.

Managing Group Projects

A local *Faith in Action* program may engage groups of volunteers for large projects or special events. For example, a group of employees or youth group may wish to help with a holiday project or fund-raising event. Volunteer supervisors will encounter different challenges when managing groups than when managing individuals. Here are some tips for meeting the challenge:

- Ask the group to designate a leader (or leaders for larger groups) and focus your communications on the group leader(s). Talk with the group leader(s) about assisting you in managing the group during the project, and establish clear lines of communication.
- Provide written information and materials on your *Faith in Action* program to group leaders, and relay details about the specific project well before the event. Ask group leaders to share the information with all group members before the event.
- Provide group leaders with a list of needed materials, tools and special instructions. Remember to provide information about the date, time and location of the event and logistical needs such as transportation and parking.
- Prepare an abbreviated volunteer agreement form, so you can collect volunteers' names and addresses at the same time they sign an agreement about confidentiality and liability. If possible, send this material to group leaders ahead of time.
- Ask group leaders to provide you with the number of volunteers who will come, as well as information about their skills, experience and special needs. When working with groups of families or youth, find out the ages of children who will participate.
- Offer clear, simple guidelines to the group in a step-by-step format.
- Be prepared in case more or fewer people show up than expected.
- If the project is planned for outdoors, have a back-up plan or a prescheduled make-up date in place.

SUPERVISION STRATEGIES FOR OFF-SITE VOLUNTEERS

Since most *Faith in Action* volunteers work in the home of the care recipient and other locations rather than in the program office, off-site supervision methods are essential to a successful program. There are three main issues to consider in supervising off-site volunteers: creating a bond to the program, maintaining communications and establishing supervisory control.

Creating a Bond

Volunteers work better when they feel closely connected to the program and identify with other members. People generally work more effectively with those with whom they have a sense of shared experience and/or a personal relationship. When people work together, this feeling will often develop naturally over time. With off-site volunteers, it will only happen if you strive to create it.

- Create a sense of personal contact whenever possible with off-site volunteers by putting a face on the program and fostering a feeling of familiarity.
- Provide new volunteers with an immediate sense of welcome and inclusiveness.
- Provide opportunities for off-site volunteers to visit the program office and to get to know others involved in the program through meetings, workshops and planning sessions.
- Connect volunteers to each other by providing a phone directory or e-mail list of other volunteers.
- Host volunteer recognition events as opportunities for volunteers to spend time together and celebrate individual and collective successes.
- Provide social opportunities for *Faith in Action* volunteers to bond with the *Faith in Action* program and with their faith groups.

Maintaining Communications

To prevent off-site volunteers from drifting away from the program, establish regular communication channels to keep volunteers informed of what is happening in the local and national *Faith in Action* programs and to allow them the opportunity to provide input.

- Publish a volunteer newsletter to tie your program's volunteers together. Having a regular forum for communication will remind you to pass along information that might otherwise get overlooked.

- Provide information on upcoming programmatic changes or pending decisions and invite volunteers input by e-mail, fax or phone.
- Take thorough notes at advisory committee and board meetings, then review your notes and pull out any items that will be important for volunteers to know. These can be communicated in a brief update letter or e-mail.
- Use your supervisory structure to engage others in helping to communicate information to volunteers through team meetings, a phone tree or other collective efforts.
- Maintain a bulletin board for each of your coalition members. Solicit help from other volunteers to keep it a current source of communication in individual congregations.
- Use your program's Web site as a vehicle for sharing information with volunteers.
- Send regular monthly e-mail messages with timely updates on upcoming events and changes in program policies, activities and needs.

Establishing Supervisory Control

Off-site volunteers may need as much support and direction as any other volunteers, but finding ways to provide it can be a challenge. Consider using multiple strategies to get information about off-site volunteers' performance and provide them with the guidance they need.

- Ensure that volunteers understand what is expected of them, through position descriptions, training, a volunteer handbook and other explanations of the program's expectations.
- Use volunteer team leaders or faith group liaisons to provide individual supervision.
- Bring volunteers together for regular team meetings.
- Provide supervision by telephone, through regularly scheduled check-in calls.
- Ask volunteers to submit standardized activity reports (by e-mail, fax or mail).
- Hold a debriefing session after special short-term projects are completed.
- Solicit feedback from care recipients on the quality of service provided by volunteers.

PROVIDING FEEDBACK TO VOLUNTEERS

Volunteer Evaluations

Evaluation of volunteers can be a very effective management tool and provide benefits to the volunteer, care recipients and the entire program. Taking the time to provide volunteers with an evaluation acknowledges their contributions and communicates your interest in their work and well-being. Evaluating volunteers provides them with an opportunity to further develop their skills and increase their value to the program. And while they cannot replace day-to-day coaching and supervision, periodic volunteer evaluations can help solidify the ongoing supervision that takes place on a regular basis, shape the overall performance of the volunteer and set the direction for the future.

A 90-day evaluation is an easy way to get this process started. Volunteers should know in advance what is expected of them (from the position description) and that evaluation is part of the supervisory process (through the orientation program and a policy or volunteer handbook). A system for evaluating volunteers should include establishing the frequency of evaluations, identifying who will conduct the evaluation and clarifying the criteria by which volunteers will be evaluated.

An evaluation should cover the following steps:

- Review goals and the volunteer’s progress towards them.
- Identify the volunteer’s strengths and ways to utilize them.
- Identify problems and how to avoid them in the future.
- Celebrate success and new knowledge and skills.
- Note assistance that will help the volunteer.
- Sketch out plans for the next evaluation.

For a sample volunteer evaluation form, see Appendix 7F at the end of this chapter.

Tips for Evaluating Volunteers

- Set up a time for the first evaluation (3-6 months after the volunteer starts) and let volunteers know how they will be evaluated.
- Make evaluations honest and clear.
- Document all evaluations, especially for volunteers who might utilize them in applying for other work.
- Phrase evaluations positively by acknowledging successes, identifying opportunities to improve skills and suggesting ways to overcome problems.

- Include information on what the volunteer coordinator or program director has done to support the volunteer.
- Ensure that volunteers have input into the evaluation process.

--Adapted from Steve McCurley and Sue Vineyard, *101 Ideas for Volunteer Programs*

Problem Volunteers

Sometimes volunteers do not perform according to the expectations of the program. In many cases, additional training or coaching will get the volunteer back on track. But in some cases, the volunteer may continue to perform poorly or may act in violation of program policies.

In dealing with a volunteer's unsatisfactory performance, follow these simple guidelines for giving corrective feedback:

- Start with something positive. Acknowledge a positive aspect of the volunteer's work (e.g., the volunteer has made some effort, has good intentions, etc.) before getting into the problem area.
- Use an appropriate tone and facial expression. This is a serious subject; it is important to look and act serious. You will simply confuse the volunteer if you are saying one thing and communicating something else nonverbally.
- Guard against "sandbagging." Do not save up a lot of small criticisms and drop them all at once on the volunteer. Small problems should be dealt with right away, through regular conversations with the volunteer.
- Be specific. Talk about what the volunteer is not doing right. Avoid vague comments, particularly if they are about the volunteer's attitude or motivations as opposed to action or behavior.
- Offer constructive suggestions. Do not simply point out the problem and then leave the volunteer to figure it out. Provide specific suggestions for solving the deficiency.
- Put the feedback in perspective. If the volunteer has done good work in other areas or at other times, acknowledge that good performance.
- Don't repeat the negative feedback. Cover the area that needs improvement and move on.
- Offer the volunteer ongoing support and assistance in improving performance.

It is possible that corrective feedback may not solve the problem. If problems do continue, you'll need to begin a written record of the situation. This case history will be important both in tracking what you are doing to correct the problem and in developing a record of the problem for use if additional measures become necessary. While no one likes to spend their time documenting problems, it will help you to determine what you need to do and, if necessary, establish for others the history of the situation.

Following the feedback session, write a memo to the file that indicates the following:

- The specific facts of the incident, including dates, parties involved and the specific nature of the poor performance for which the feedback was given
- The nature of the conversation with the volunteer about the incident or situation, including their own explanation of the reasons for their performance
- Any corrective actions that were identified with the volunteer, including any timeline for their implementation

Volunteer Dismissal

In rare cases, a volunteer must be separated from the program because of some serious violation of policy (for example, a breach of confidentiality) or for not performing acceptable work. In such situations, care recipients may be at risk, and the program's reputation and the morale and productivity of other volunteers may be in jeopardy. Decisive action is required.

When considering dismissal of a volunteer, seek the guidance and support of other key members of the volunteer program. Discussing the situation with your supervisor or a member of the advisory committee may give you insights on how best to handle the situation. Your response may depend on the role and longevity of the volunteer, the nature of the problem behavior, and the volunteer's other relationships (for example, if the volunteer comes from a coalition member).

How To Terminate a Volunteer

- Be quick and direct. Do not make small talk or beat around the bush.
- Announce, do not argue or apologize. Have your facts and reasoning ready and state your case.
- Do not counsel the volunteer. Trying to make the volunteer feel better may lead to confusion.
- Follow-up with the volunteer in writing. Without rehashing the details, reinforce the point that the individual is no longer a volunteer with the program.

It is never pleasant to fire someone. The object is to hire so well, train and supervise so well, and evaluate and recognize so well that problems are addressed and resolved along the way. If you do have to terminate a volunteer, at least you will know that you have a process in place for that action, and that terminating the volunteer was the action of last resort.

PREVENTING VOLUNTEER BURNOUT

Helping Volunteers Set Boundaries

The service that *Faith in Action* volunteers provide can be very personal and intensive. In order to maintain the energy and enthusiasm needed for this kind of service, *Faith in Action* volunteers need to have clear boundaries. A boundary is not a barrier, but a line of demarcation between two or more people that helps them maintain a sense of identity. Clear boundaries are essential in caregiving because they clarify roles, relationships and expectations. Boundaries can also provide physical or emotional safety, by setting limits on how two people interact. In addition, the act of establishing boundaries can help a person establish a unique identity.

Many people have difficulty maintaining healthy boundaries or recognizing when they have lost sight of them. Fortunately, people can be taught to set and maintain boundaries.

Some boundaries are set for volunteers by the program in the form of policies, such as the following:

- Confidentiality: Volunteers will not reveal the identity of care recipients to anyone not associated with their caring support.
- Money: Volunteers are not to accept money from care recipients, but donations may be made to the local *Faith in Action* program. Also, volunteers should not give or lend money to care recipients.
- Inappropriate relationships are unacceptable.
- Proselytizing is unacceptable.
- Informal caregiving: Volunteers will not provide formal medical care to care recipients.

In addition, there are some areas in which volunteers may want to set boundaries for themselves:

- Time: "How much time am I willing to give? What days and hours am I available to volunteer? Can I commit to being prompt and always being on time?"
- Responsibilities: "I'll help with light cleaning, but I won't carry heavy items."
- Emotional limits: "How close am I willing to become to this care recipient?"

Volunteer training and supervision meetings are opportune times to guide volunteers in exploring the issue of boundaries.

Team Meetings Prevent Burnout

From a *Faith in Action* program in Wisconsin:

This Care Team Ministry holds regular monthly meetings wherein all volunteers come together for mutual support, expression of feelings regarding their individual service and sharing concerns about the care partners they serve. In the course of the meeting, team members support one another by sharing their experiences, a process which often helps them process and cope with difficult situations. The team explores issues of maintaining healthy boundaries and setting limits of care. Together the group of volunteers helps define what might be overextending oneself.

Helping Volunteers Manage Stress

Self-care and self-respect are the keys to successful long-term caregiving. Volunteer coordinators have a responsibility to watch for signs of burnout among volunteers and to provide support to volunteers who are feeling stressed or overcommitted.

Some warning signs of burnout:

- Irritability
- Tardiness or not showing up at all
- Lack of interest in work that used to excite the volunteer
- Not responding to calls or mail
- Decline in quantity and/or quality of work

Ways of preventing burnout:

- Provide variety in the work.
- Encourage breaks and vacations from volunteering.
- Provide opportunities to express and process feelings.
- Offer a partner volunteer to assist the volunteer with caregiving.
- Watch for over-commitment in a volunteer who readily takes on responsibility.

Caregiver's Bill Of Rights

A Caregiver has the right…

- To enjoy open and honest communication with the care recipient, his/her friends, family and other caregivers.
- To express opinions and suggestions when appropriate.
- To expect the care recipient, as much as possible, to make decisions and take initiative related to his or her care.
- To make reasonable requests of the care recipient.
- To take care of personal needs without feeling guilty.
- To express emotions in front of the care recipient.
- To acknowledge personal limitations and obtain assistance from outside resources.
- To continue maintaining relationships and activities outside of the caregiving role.
- To not take responsibility for decisions and actions made by the care recipient.

--Adapted from an article in *Make Today Count* by Virginia Flagg, Ph.D., Alvarado Chapter, American Cancer Society.

Appendix 7A

Service Program Contacts

National Service Programs

Corporation for National and Community Service
1201 New York Ave., NW
Washington, DC 20525
(202) 606-5000
www.nationalservice.org

Runs national service programs such as AmeriCorps, Learn and Serve and Senior Corps. Visit their Web site to find out about programs in your state and learn how to become a national service sponsor.

Federal Work-Study

The Federal Work-Study Program provides jobs for undergraduate and graduate students with financial need, allowing them to earn money to help pay education expenses. The program encourages community service work and work related to the student's course of study. Students are permitted and encouraged to work off campus for a private nonprofit organization or a public agency, performing work in the public interest. The number of hours a student can work is based on the amount of the Federal Work-Study award received. Contact the financial aid office of local colleges and universities to see if your program can serve as a Work-Study site for their students.

Retired and Senior Volunteer Program (RSVP)

RSVP is part of Senior Corps, a network of national service programs that provides older Americans the opportunity to apply their life experience to meeting community needs. RSVP volunteers serve in a diverse range of nonprofit organizations, public agencies and faith-based groups. Visit www.nationalservice.org and click on "Senior Corps."

Appendix 7B

Sample: Volunteer Position Description

Title: RESPITE VOLUNTEER TEAM LEADER

Qualifications: At least one year experience as a Respite Volunteer is preferred; completion of basic volunteer training and specialized Respite Volunteer training; 18 years of age or older; personal dedication, concern and maturity; some flexibility in time availability for volunteer service.

Function: To coordinate and supervise one team of Respite Volunteers on one team and to serve as a liaison between the *Faith in Action* program and team members.

Responsibilities:

- Make and/or assist the Volunteer Coordinator (or Program Director) in making assignments of Respite Volunteers to care recipients, using available information to ensure an appropriate match.
- Conduct screening interviews of potential new Respite Volunteers and care recipients.
- Contact members of the team and care recipients on a regular basis for purposes of support and supervision.
- Consult with the Volunteer Coordinator (or Program Director) whenever support or assistance is needed.
- Maintain accurate records of the team's Respite Volunteers and care recipients as well as volunteer service activities and quality assurance of the care recipient.
- Conduct monthly team meetings for purposes of providing support, supervision and information.
- Communicate with team members about important information concerning the program and outside resources.
- Attend and participate in monthly Team Leader meetings and notify in advance if attendance is not possible.
- Notify the Volunteer Coordinator (or Program Director) in a timely manner of any change in the status of care recipients served by the team.
- Attend training as offered, when possible.

Supervised by: Volunteer Coordinator (or Program Director)

Appendix 7C

Sample: Volunteer Handbook Contents

1. Greeting letter from program director and board president
2. Program description: goals, history, services
3. Sample of program publications
4. Organizational chart of program, consortium or parent organization (as appropriate)
5. Contact information for key staff and volunteers
6. Board list
7. Coalition member list
8. Position descriptions for volunteer roles
9. Sample record-keeping forms: care recipient log, time sheets, etc.
10. Reimbursement policies and forms
11. Termination procedures
12. Dress code
13. Hours and methods for changing schedule or being absent
14. Insurance forms and enrollment forms
15. Emergency procedures
16. Evaluation process
17. Grievance procedure
18. Volunteer benefits listing
19. Listing of technical terms commonly used in the program, with appropriate abbreviations
20. Information on client rights, confidentiality and legal restrictions
21. Volunteer promotion opportunities
22. Policies on the use of program facilities, equipment and services
23. Map of area and program facilities

Appendix 7D

Motivation Self-Assessment

Directions: Each of the following items consists of three related statements. Mark the statement that most closely describes your preference, most of the time. There are no right or wrong answers.

1. _____ a. When doing a job, I prefer to have specific goals.
   _____ b. I prefer to work alone and am eager to be my own boss.
   _____ c. I seem to be uncomfortable when forced to work alone.

2. _____ a. I go out of my way to make friends with new people.
   _____ b. I enjoy a good debate.
   _____ c. After starting a task, I am not comfortable until it is completed.

3. _____ a. I enjoy offering advice to others.
   _____ b. I prefer to work in a group.
   _____ c. I get satisfaction from seeing tangible results from my work.

4. _____ a. I work best when there is some challenge involved.
   _____ b. I would rather give direction than take direction from someone else.
   _____ c. I am sensitive to others—especially when they are mad.

5. _____ a. I like being able to influence decisions.
   _____ b. I accept responsibility eagerly.
   _____ c. I try to get personally involved with my superiors.

6. _____ a. I place importance on my reputation or position.
   _____ b. I have a desire to out-perform others.
   _____ c. I am concerned with being liked and accepted.

7. _____ a. I enjoy and seek warm, friendly relationships.
   _____ b. I attempt complete involvement in a project.
   _____ c. I want my ideas to predominate.

8. _____ a. I desire unique accomplishments.
   _____ b. It concerns me when I am being separated from others.
   _____ c. I have a desire to influence others.

9. _____ a. I think about consoling and helping others.
   _____ b. I am verbally fluent and persuasive.
   _____ c. I am restless and innovative.

10. _____ a. I set goals and think about how to attain them.
    _____ b. I think about ways to change people.
    _____ c. I think a lot about my feelings and the feelings of others.

*Adapted from Marilyn Mackenzie and Gail Moore, *The Volunteer Development Toolbox*, 1993.

Appendix 7E

Key: Motivation Analysis

Directions: Record your choice of each statement by putting a mark or check in the space provided below for each of the three motivators. If your answer to #1 was "b," you would put a mark on the line titled "empower." Do that for each question. Then add the total number of marks for each of the three categories: achievement, empower and affiliation.

1.	____a. achievement ____b. empower ____c. affiliation	6.	____a. empower ____b. achievement ____c. affiliation
2.	____a. affiliation ____b. empower ____c. achievement	7.	____a. affiliation ____b. achievement ____c. empower
3	____a. empower ____b. affiliation ____c. achievement	8.	____a. achievement ____b. affiliation ____c. empower
4.	____a. achievement ____b. empower ____c. affiliation	9.	____a. affiliation ____b. empower ____c. achievement
5.	____a. empower ____b. achievement ____c. affiliation	10.	____a. achievement ____b. empower ____c. affiliation

ACHIEVEMENT ______________________

INFLUENCE ________________________

AFFILIATION _______________________

*Adapted from Marilyn Mackenzie and Gail Moore, *The Volunteer Development Toolbox*, 1993.

Appendix 7F

Sample: Volunteer Feedback and Evaluation Form

Name of Volunteer:___________________________ Period covered:__________

Volunteer Position: _________________________ Date of evaluation: _________

1. Position Goals:

	Not met		Satisfactory		Superior
1. ______________________________	1	2	3	4	5
2. ______________________________	1	2	3	4	5
3. ______________________________	1	2	3	4	5
4. ______________________________	1	2	3	4	5
5. ______________________________	1	2	3	4	5

2. Work Relationships

	Not met		Satisfactory		Superior
a. Relations with other volunteers	1	2	3	4	5
b. Relations with staff	1	2	3	4	5
c. Relations with care recipients	1	2	3	4	5
d. Meeting commitments on hours and task deadlines	1	2	3	4	5
e. Initiative	1	2	3	4	5
f. Flexibility	1	2	3	4	5

3. Comments by supervisor regarding above areas:

4. Comments by volunteer regarding above areas:

5. Most significant achievement during period of evaluation:

6. Major area in which improvement, change or further training would be desirable, with description of suggested course of action:

7. Overall, how does the volunteer feel about remaining in this position? What change in nature of responsibilities or procedures would improve the ability of the volunteer to contribute to the program?

8. What are the major goals for the volunteer to accomplish between now and the next evaluation?

a. ____

b. ____

c. ____

d. ____

e. ____

9. Scheduled date for next evaluation: ________________________

Signatures:

Supervisor: ____ Date: __________

Volunteer: ____ Date: __________

*Adapted from Steve McCurley and Rick Lynch, Volunteer Management: *Mobilizing All the Resources of the Community*, 1996.

Volunteer Recognition

8

OVERVIEW

FAITH IN ACTION

Recognizing volunteers is often thought of as a once a year event where awards or gifts are presented to volunteers for their efforts and length of service. Although an annual event, awards and gifts can be part of your program's recognition activities, you are missing the point if this is the total focus of your volunteer program's recognition plan. Acknowledging, approving, showing gratitude and noticing a job well done should not be rare events, but rather regular and ongoing activities.

Showing and telling people that they are appreciated as individuals and that their work is valuable is motivating and renewing. Recognition can come in many forms, from a simple thank-you or birthday card, to making a new volunteer feel connected to others in the program by seeking out and using their ideas, to nominating a volunteer for a national award.

All volunteers seek recognition of some kind. But individuals are unique, with different motivations for volunteering. Recognition, therefore, cannot be "one size fits all."

While it is the volunteer coordinator's responsibility to ensure that volunteers receive ongoing acknowledgement and thanks, others can take an active role in planning and implementing recognition events and gestures. Recognition as an everyday process is the theme of this chapter. It shares a variety of ways to ensure that your volunteers feel valued and appreciated. Providing ongoing recognition takes time, effort and thought, but it is worth it.

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WEAVING RECOGNITION INTO THE PROGRAM

Whether your *Faith in Action* program is large or small, established or new, volunteer recognition should be integrated into every aspect of the program. Take every available opportunity to show volunteers (as well as staff) that they are appreciated and their contributions are valued. At the most basic level, this means that volunteer jobs are fulfilling and well designed, and that volunteers know what is expected of them, necessary supplies and equipment are on hand, no time is wasted in unproductive meetings or training and supervisors are available to answer questions and assist with problems.

In other words, the atmosphere or climate of the program is critical in showing appreciation and says a lot about how volunteers and staff are valued. What is your *Faith in Action* program's climate? Make sure it is inclusive and welcoming to all. Do all volunteers feel connected and essential to the program and its mission, or do some feel they are simply a pair of hands? Are volunteers included as idea generators and problem solvers, or only as implementers of someone else's plans? Are they told to do things because "that's how we've always done it?" Do volunteers who work in the office feel as important and valued as the volunteer caregivers, the congregational coordinators or the board members? If the climate is not welcoming to all, what can or should you do to change the climate?

Effective recognition is closely tied to retention of volunteers. In a 1998 United Parcel Service survey of volunteers who had stopped volunteering, nine percent of the respondents specifically stated it was because they were not thanked, 23 percent because the program did not use their time well, and 18 percent because the program did not use their talents well. All of these problems can be linked to lack of recognition for volunteers, either by not thanking them or by not valuing the time and talent that they bring to their volunteer work.

Day-to-Day Recognition

The following ideas represent just a few of the ways you can weave recognition and appreciation into your day-to-day practices:

- Build a team. Make sure that staff and regular office volunteers know and call other volunteers by name and greet them whenever they come into the office. Make sure that volunteers meet and know the other volunteers as soon as possible.
- Join various volunteers for coffee or lunch occasionally. Avoid cliques.
- Set aside a volunteer area in the office for coats, coffee, refreshments and a bulletin board with announcements and photos. Even volunteers who are not often in the office should have a place of their own, no matter how small it might be.

- Provide parking and daycare services, if possible, even if it is only for training, meetings or other special gatherings.
- Let it be known that there is an open door policy for any volunteer who needs to discuss a critical concern.
- Thank volunteers or groups immediately following specific accomplishments beyond normal volunteer activities. This can be done face-to-face, by writing or e-mailing a note, by phone or in a newsletter or article on the bulletin board, depending on the accomplishment.
- Share good news with others who know the volunteer.
- Take a personal interest in your volunteers. Send birthday cards and get-well notes (or make phone calls), reach out and give support during times of sorrow and celebrate during joyful times, such as the birth of a child or grandchild. Enlist help from your board and care recipients to help with this special service to volunteers.
- Reinforce good deeds and ideas whenever they happen and encourage others to do the same. Be positive toward and respectful of each other.
- Discourage practices or policies that make one group of volunteers feel more important than others—adult volunteers versus youth, board members versus caregivers or office workers, experienced volunteers versus new or long-term volunteers versus short-term.

Sincerity Counts

It’s essential to be both timely and honest as you build or expand your program’s recognition strategy. Saying thank-you at a recognition luncheon in May for an accomplishment in December may ring hollow if no thanks were given or appreciation shown right after it occurred. If the efforts of volunteers are not noted on a timely basis, by the time May arrives they may have left to seek more rewarding activities. The more immediate the thanks, the more meaningful it is.

Most people, including volunteers, want recognition that is deserved and appropriate for their efforts and accomplishments. Other volunteers, as well as the person receiving the recognition, will know whether the thanks and recognition are sugary and insincere or sincerely given and well deserved. This applies to day-to-day expressions appreciation as well as more formal recognition.

Although volunteers are not likely to be motivated purely by recognition, an award or recognition gift can be demoralizing if someone else deserves credit as well—or even instead—and that person is not recognized. This includes staff as well as other volunteers. Sincere, consistent and well-deserved appreciation is critical to keeping volunteers engaged. Do highlight the leadership given by the congregational coordinators and board members in their congregational bulletins and your program’s newsletter, but be sure to include as well appropriate thanks for the accomplishments of the office volunteers. Do not forget quiet Mary and her fifth year in your program when you recognize sociable Claire, who has been telling you for months that June will mark her fifth year.

In order to be consistent in recognizing efforts, volunteers' length of service and other relevant information should be kept in volunteer records. Records can be kept electronically or manually. Determine the information you need in order to keep track of birthdays, start dates and accomplishments, and begin building these records when every new volunteer comes on board. As you get to know your volunteers, add information such as anniversaries, various volunteer activities, committee work, awards received and when, etc. These records need not be laborious, just relevant.

RECOGNIZING VOLUNTEERS' MOTIVATIONS AND SITUATIONS

The Call to Service

Many *Faith in Action* volunteers are recruited from interfaith networks. They are motivated by a religious and spiritual calling to participate in care teams or serve as individuals. These volunteers receive intrinsic rewards when they fulfill their call to service and act on their faith through volunteering. These are certainly powerful rewards that address these volunteers' motivational needs. Having a time and place to share and celebrate the deepening of their faith through service is very important to many *Faith in Action* volunteers.

There are many ways to build on this motivation, for example:

- Have an interfaith prayer or meditation.
- Share teachings and traditions of various faiths during training or other meetings and in newsletters.
- Hold recognition events at various houses of worship so that volunteers may be affirmed by their congregation as well.

Achievers, Affiliators and Empowerers

Other motivations are also at work for each *Faith in Action* volunteer, whether they were recruited through interfaith networks or from the larger community. These distinct motivations explain why some may fulfill their call to service as office volunteers while others are dedicated friendly visitors and still others prefer to serve as members of an advisory board. As discussed in Chapter 2, positions should be designed for different volunteer personalities, based on the general motivational classifications of Achiever, Affiliator and Empowerer. These same types should be kept in mind when planning recognition activities and events and developing good practices.

One size does not fit all. Some volunteers will love receiving the "Good Samaritan" award for outstanding service (the Achievers), others will enjoy celebrating together and recognizing each other's work at a social gathering (the Affiliators) and others will be thrilled to share their *Faith in Action* experiences through a feature article in the local community newspaper (the Empowerers). Please note that these labels are not meant to stereotype particular types of volunteers. Everyone has these motivational drives to varying degrees and the proportions may change during the course of the volunteer's life. But these classifications can provide useful insights and clues about the type of recognition that might be valued and appreciated by people with different motivations.

From the standpoint of recognition, the needs of volunteers with these different motivations can be described as follows:

Achievers

- They are goal-oriented problem solvers and look for measurable results.
- They are pleased to be considered for more challenges or selected to accomplish a complex responsibility that includes goals to achieve some specific results or accomplishments.
- They like a supervisor to give clear goals and describe expected outcomes.
- They are honored to receive awards, certificates or other recognitions that are tied specifically to their accomplishments.

Affiliators

- They are pleased to work on congregational care teams, committees and other group projects that allow them to build strong relationships with others.
- They seek opportunities to interact with others and make new friends.
- They appreciate a personal relationship with their supervisor and coworkers.
- They appreciate recognition during group events that allow others to see what they have done and where they can socialize with others.
- They are touched by very personal recognition, such as thank-you letters from the care recipients or notes to significant people and groups in their lives about how they have helped others.

Empowerers

- They want assignments that allow them to influence others and make a difference.
- They appreciate a supervisor who is available but does not micromanage.
- They make excellent event and committee chairs who can balance the needs of others with the goals they are trying to accomplish.
- They are empowerers of others and therefore are good teachers and motivators; others listen and look up to them.
- They favor recognition that uses the opportunity to tell the story of the program or the needs of the care recipients to the public at large.
- They appreciate recognition from people in authority or of higher status.
- They consider more access to authority or information as recognition.

As you read through these descriptions, can you think of certain volunteers in your *Faith in Action* program who fall into each of these classifications? It is important to keep these different motivations in mind when you plan recognition. To be effective, recognition should be valued by the individual receiving it.

If you have only a few volunteers or wish to recognize one or two volunteers, you can design very personal ways to recognize each one. If you have a larger program, an ideal recognition plan will require a mixture of activities and ways of saying thank-you that focus on different motivations and volunteer personalities.

Volunteers' Unique Situations

In addition to planning recognition around motivation, also consider the lifestyles, life stages and length of involvement that various individuals and groups of volunteers bring to the mix of your volunteer corps. If your caregiving program wants to retain or attract employee volunteers, families, youth or episodic volunteers, develop recognition activities so that everyone feels included and appreciated (and, hopefully, inspired to become lifelong *Faith in Action* volunteers).

For example, Many of your volunteers are no longer available to come to the annual recognition luncheon on the third Tuesday in May. By all means, continue to have the luncheon if there are many volunteers in your program who love this gathering and look forward to it each year. However, build in some additional ways to recognize and thank other volunteers and groups of volunteers who can not attend the annual event.

Try some of these ideas or, better still, brainstorm with your volunteers to compile a list of recognitions that fit your program's volunteers:

- Send a letter of commendation to a volunteer's employer or an article and photograph to the employee volunteer program coordinator to put in the company newsletter.
- Develop a Volunteer Spotlight section in your newsletters or on the Web site and share information regularly about volunteers.
- Place messages recognizing volunteers in congregational bulletins.
- Send letters to parents, grandparents and pastors commending young individuals or youth groups for their service.
- Act as a reference for young volunteers seeking jobs or for adult volunteers re-entering the job market.
- Keep all volunteers in the communication loop with newsletters, e-mails and other sources of information about the program.
- Give an inspirational book inscribed to the volunteer.
- Take a group photograph of volunteers working for your program and send a copy to the group leader to share with each volunteer. (Use these photos in recruitment brochures to recruit other groups.)
- Ask some volunteers to provide lunch and meet with another group of volunteers who are doing yard work or house repairs at a care recipient's home on a Saturday.
- Give service pins with the *Faith in Action* logo to all volunteers. (These pins may also provide an opportunity for volunteers to share with others what they do for the *Faith in Action* program.)
- Give out free or discount tickets or gift certificates for local merchants and restaurants.
- Coordinate a phone thank-a-thon by having board members call and thank each volunteer for their service.

For a good mix in your recognition plans, strive for both informal (day-to-day) and formal recognition. Think of timely, diverse and meaningful ways to show appreciation for your volunteers.

The list of ways to recognize and thank volunteers is limited only by the imagination of the people making up the list, not by the amount of money in your budget. Just consider your volunteers as individuals and think of ways to show them that they are appreciated for making an essential contribution to the program.

For an additional list of recognition ideas that have been used successfully by other *Faith in Action* programs, see Appendix 8A.

RECRUITING THROUGH RECOGNITION

When planning your program's recognition activities and selecting public forums to thank your volunteers, use these events to share information about your *Faith in Action* program and encourage others to get involved. Use faith congregations' bulletins, local newspapers, luncheons and communications with businesses and community groups to tell the story of your program and share information about volunteer opportunities. This should be done in an integrated, concise way that does not take away from the recognized individual or group and their accomplishments. Speak to others in the audience who are looking for ways to get involved. They will be reading the publications, joining others at the luncheon or working at the businesses where you choose to thank your volunteers.

Telling the *Faith in Action* Story

Here's an example of telling the story about volunteer involvement from a *Faith in Action* program in California:

The *Faith in Action* program uses volunteers to provide friendly visits and companionship to neighbors with mental illness. This program hosted an "Evening of Stories" at which board members and volunteers gathered to share the heartfelt and moving stories of how interfaith caregiving is making a difference in the lives of volunteers and care recipients. This event not only recognized the vitally important work of the volunteers, but also provided board members with genuine stories that they can share with the community as they increase awareness and raise funds for the program.

Many local communities host special awards and recognition for which you may want to nominate one or more of your volunteers or your volunteer program. Local United Ways, volunteer centers, congregations, companies and associations for volunteer managers coordinate volunteer events and awards to recognize outstanding volunteers and volunteer programs. Nationally, the Points of Light Foundation recognizes 365 volunteers a year with a Daily Points of Light award and selects volunteers annually for the President's Community Service Awards presented at the White House. These awards give national recognition to the individual volunteers and their programs.

THE RECOGNITION COMMITTEE

Who is going to do all the work of brainstorming, planning, organizing and implementing the recognition for your caregiving program? This is an ideal project for a committee. The recognition committee may include current volunteers, congregational liaisons or coordinators, board members and even care recipients who have an interest in recognizing others' good works. If you have a small or new *Faith in Action* program, you may want to start out with just one committee to assist you with job design, recruitment, training and recognition.

Consider the following as you set up your recognition committee:

- Select a committee chair. Look for someone who is well organized and works well with other people. This person should know how to run meetings and follow up. The chair need not do all the work, but will coordinate the work of others on the committee.
- Work with the chair to identify the goals and mission of the committee and determine the members and skill sets needed for the committee to be successful. Look for members who have the time, interest and skills to fulfill the committee's responsibilities.
- Ask each person individually to serve on this committee. Be specific as to why you are asking each of them and what they can bring that is critical to the success of the committee. People are usually quite flattered if you can tell them why you feel they have the skills the committee needs. Make it clear that you are not recruiting just anyone to serve on this committee.
- If someone cannot commit at this time, identify who else has the time, interest and specific skills needed to make the committee successful. Ask these individuals to serve.

An Effective Recognition

A *Faith in Action* program in Alabama provides its volunteers with a laminated 6"x 4" sign for the front windows of their autos, name tags to identify themselves to the care recipients and calling cards with the office phone number to leave with care recipients. Donations underwrite these expenses. People see the auto placards and stop to ask the volunteers about what they do. On one occasion, a ticket was avoided due to the sign in the window.

This is a simple way to let these *Faith in Action* volunteers (including board members) know that they are very special and appreciated members of the organization.

Appendix 8A

Recognition Ideas from *Faith in Action* Programs

Food and Fellowship Gatherings

- Reception at local bed and breakfast
- Pot luck dinner at local congregation
- Afternoon tea and dessert at local congregation
- Pizza party at program office
- Cookout at board member's house
- Open House at program with finger foods
- Ice Cream Social at local park
- Dinner with set menu at local restaurant

Special Themes

- Valentine's Day: "We Love our Volunteers"
- "Volunteer Round-Up" with "wanted" posters (have volunteers invite a potential new volunteer to the party, too)
- Anniversary of Program Party
- "Magical Evening" with local magician entertainment
- "Sounds of Music" with local congregational choirs as entertainment

Sources of Support

- Local businesses (invitations, decorations, door prizes, certificates, funds)
- Local restaurants (food, door prizes)
- Individual donors and family bequests (volunteer certificates, namesake awards)
- Coalition members (space, food, decorations)
- Local hospitals (space, awards, food)
- Local movie theatres and community theatres (door prizes, special showing for volunteers)
- Local gift and card store (decorations, candle gifts, door prizes, invitations)
- Local nursery or flower shop (centerpieces, door prizes, carnations)

Types of Awards

- Volunteer Hall of Fame
- Golden Glove for Homecare Volunteers
- Volunteer of the Year
- Shining Star
- Most Years of Service
- Longest Volunteer/Care Receiver Match

Gifts for Volunteers

- *Faith in Action* pins
- Rockers for *Faith in Action* pins
- Certificates of Distinction
- Gift certificates (stores, grocery, gas, movies)
- Angel ornaments
- Candles
- Frame and picture
- Flowers or plants
- Baked goods
- Framed quotes

Other Recognition Ideas

- Hold reflection meeting to share volunteer stories.
- Display thank-you letters from care recipients in program offices.
- Collaborate with other agencies to share costs and host a celebration.
- Make tapes of care recipients sharing stories of their volunteers and play the tapes at a banquet.
- Have volunteers participate in "white elephant" gift exchange.
- Invite volunteers to a special meeting of the board.
- Ask coalition members to host "*Faith in Action* Day," honoring volunteers during the congregation's worship service.
- Create a volunteer section or volunteer edition of your newsletter with pictures and profiles.
- Send semi-annual thank-you letter to all volunteers.
- Initiate a Governor or Mayor's proclamation for "*Faith in Action* Volunteer Day."
- Maintain volunteer scrapbook with photos and stories.

Special thanks to the many *Faith in Action* programs that shared their ideas with the national office.

Volunteer Program Evaluation

9

OVERVIEW

FAITH IN ACTION

In program evaluation, information is carefully collected and then used by program planners to make decisions. Program evaluations aid in decision-making and help identify areas that need improvement. It is important to periodically evaluate all aspects of the volunteer program. Rather than dreading the prospect of evaluation, the knowledgeable volunteer coordinator realizes that it is a crucial step in achieving *Faith in Action*'s mission.

Faith in Action volunteer programs are organized efforts to provide informal caregiving services to people with long-term health conditions. Program evaluations help uncover whether the volunteer program is working well for the care recipients, organization and volunteers. Evaluations can look at different aspects of the program, such as inputs, activities and process, outputs, outcomes and impacts. The type of evaluation depends on what the coordinator and other leadership want to learn and need to know in order to improve the program.

This chapter looks at volunteer coordinators' choices for collecting and analyzing information. It also covers what coordinators need to know in order to make programmatic changes based on the results of their evaluations.

CHAPTER 9: VOLUNTEER PROGRAM EVALUATION

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9A. Volunteer Satisfaction Survey

PURPOSE OF VOLUNTEER PROGRAM EVALUATION

The main purpose of volunteer program evaluation is to demonstrate the impact of the program. The evaluation process can highlight the program's effectiveness and assure the local community, congregations, organization and volunteers that their social service investment is worthwhile. Evaluations can also reveal challenges and needs that the program must address in order to remain vital. It is important to evaluate the volunteer program regularly in order to assess its effectiveness and make decisions regarding program development.

Program evaluations can help accomplish the following objectives:

- Assess the impacts of products or services on care recipients. "Outcome" and "impact" evaluations are increasingly required by funders to verify that volunteer programs are indeed helping their care recipients.
- Identify program strengths and weaknesses and find ways to improve or streamline delivery of services. Over time, product or service delivery can become an inefficient collection of activities that wastes time and money.
- Confirm that the program is adhering to its original mission. Typically, plans to deliver services end up changing substantially as those plans are implemented. Evaluations can confirm whether or not the program is truly running as originally designed.
- Explore the program's goals and discern whether or not and how these goals are being achieved.
- Produce data or compile results that can be used to publicize and promote services in the community.

Design evaluations to demonstrate the effectiveness of your program and point to ways to improve and strengthen it. Ask questions that are directly related to your program objectives:

- What is your program trying to achieve in the community?
- What is your program trying to achieve for your volunteers?
- What is your program trying to achieve for your organization?

EVALUATION CATEGORIES

There are very different aspects of the program that an evaluation can examine. In general, the main categories for evaluation are inputs, activities and process, outputs, outcomes and impacts.

Inputs

Inputs are resources invested in the volunteer program, such as funds, staff time or office space. Any resources dedicated to or consumed by the program are its inputs:

- Dollars
- Staff
- Staff hours
- Volunteers
- Volunteer hours
- Facilities
- Equipment
- Supplies

Activities and Process

What the program does, how the volunteer program is conducted, levels of satisfaction and other aspects of day-to-day operations are considered as "activities and process." A process evaluation examines what the program does with its inputs to fulfill its mission. Activities include the strategies, techniques and types of treatment that compose the program's service methodology.

Here are some activities and process questions for understanding how the volunteer program really works, its strengths and its weaknesses:

- On what basis does the program decide that interfaith caregiving services are needed?
- What is required of the staff, board, council, coalition or volunteers in order to deliver the services?
- How are program staff and volunteers trained to deliver services?
- How do care recipients enter the program and request various caregiving services?
- What is required of care recipients or neighbors in need?
- What is the general process that care recipients go through with the program?
- What do volunteers and care recipients consider as the strengths of the *Faith in Action* program?
- What typical complaints are heard from volunteers, coalition members and/or care recipients?
- What do volunteers and care recipients recommend as improvements to the program?

Outputs

Outputs are a quantitative measure of volunteer accomplishments. They are the direct products of program activities and usually are measured in terms of the volume of work accomplished—e.g., numbers of rides provided, volunteers recruited, meals delivered and care recipients served. Outputs have little inherent value in and of themselves. While outputs are important to evaluate as a measure of services provided, they prove only that the program is functioning. Outputs cannot prove that the program made a difference.

Outcomes

Program evaluations that focus on outcomes look for short-term benefits or changes in communities, individuals and organizations. Demonstration of outcomes is an increasingly important element of data collection for nonprofits and is often requested by funders. An outcomes-based evaluation asks whether the program's activities are actually producing the needed or desired results.

Outcomes usually point to benefits for clients, volunteers, the organization, the congregation or the community. Outcomes are very different from outputs, although the two are often confused. For example, while an output might be the number of individuals who went through training, an outcome would be a desired result from the training, such as new skills and attitudes or improved performance.

TIPS

An Outcomes-Based Evaluation

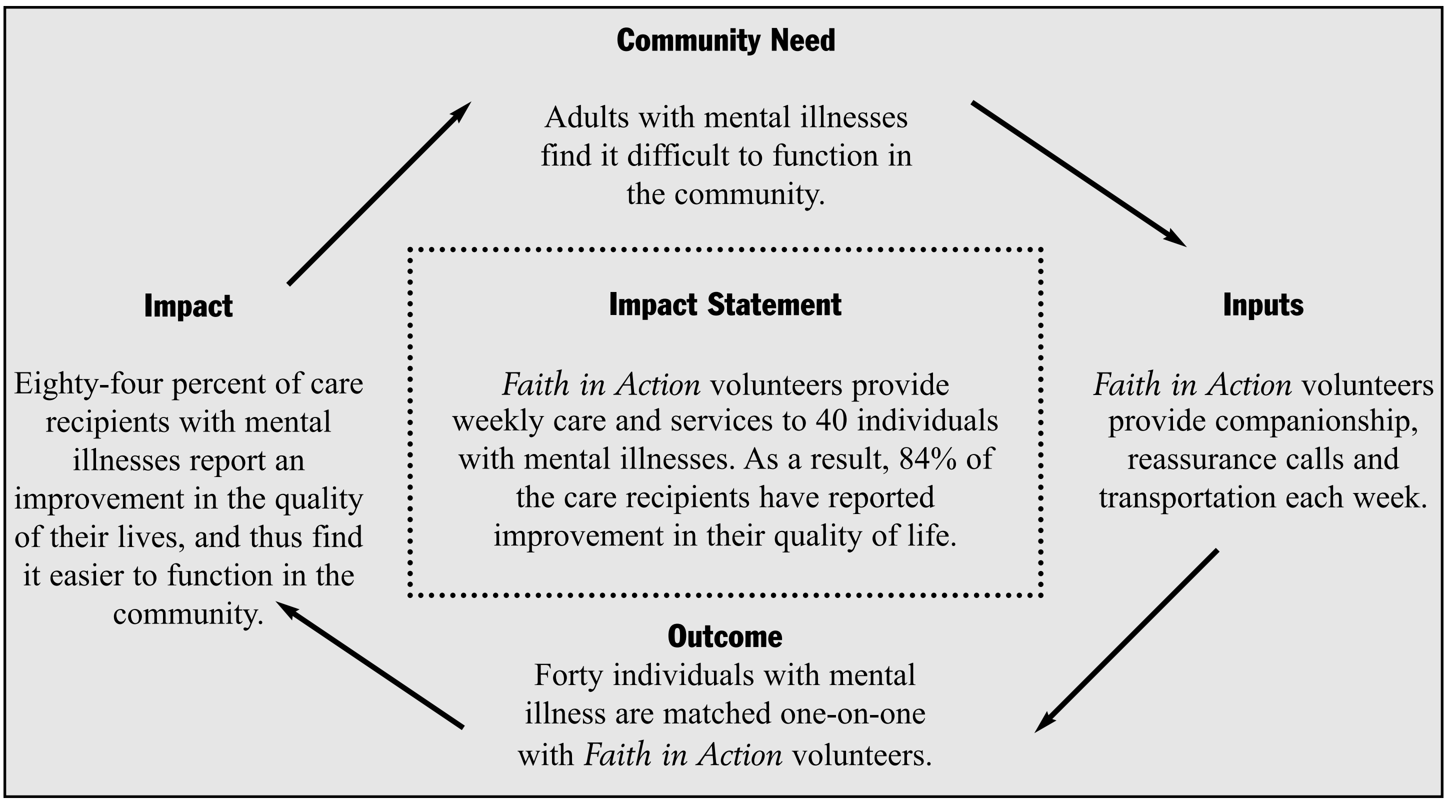
To conduct an outcomes-based evaluation, follow these general steps:

- Identify the major outcomes that you want to examine for the program. For example, you may want to look at the effect of volunteers' efforts on care recipients. An outcomes-based evaluation might assess whether the program increased care recipients' self-reliance or daily activities, improved their connection to the community or enhanced their quality of life.
- Choose the outcomes that you want to examine and prioritize them. If your time and resources are limited, pick the top two to four most important outcomes to examine for now.
- For each outcome, specify what observable measures, or indicators, will suggest that the program is achieving that key outcome. This is often the most important and enlightening step in outcomes-based evaluation, but also the most challenging and even confusing. Outcome measurement asks you to go from an abstract concept (such as increased self-reliance) to specific activities that indicate the outcome is taking

place (e.g., with caregivers' help, care recipients are able to get themselves to and from medical appointments, maintain healthy eating, or pay their bills on time.)

- Specify a "target" goal, such as the number or percentage of care recipients for whom you want to achieve a specific outcome.
- Identify the information needed for the indicators.
- Decide how information can be efficiently and realistically gathered. Your choices include reviewing program documentation, observing volunteers and clients, interviewing care recipients, distributing questionnaires and conducting case studies of program failures and successes. It is not necessary to do all of these, but your findings will be more valid if you use more than one of these methods in your evaluation.
- Analyze and report your findings.

Impact Evaluation Process



Adapted from Rick Devich, in *Measuring the Difference Volunteers Make*, 1996.

DECIDING WHAT TO TRACK

Program Goals for the Community and Care Recipients

For a volunteer program to be successful, the coordinator must know the community well. Unemployment, a highly transient population and varying income levels can all directly affect a volunteer program. In order to see the big picture, volunteer coordinators need to assess who lives in their local areas and what are the community needs.

These are some questions to consider when identifying program capacity and community needs:

- What will the volunteer program achieve for the community?
- What are the issues to be resolved in the community?
- What needs or problems could the volunteer program involve local residents, as volunteers, in solving?
- Has the program director recently done a community needs assessment or reviewed a recent assessment done by another community group, such as United Way?
- What does the community look like? Who lives in the community? What is it like economically and socially?
- What are the community's strengths and capacities?
- What kinds of skills, talents and assets do local residents have?
- What kinds of organizations are based in the community: private, public and nonprofit? What religious congregations are represented in the community?

Program Goals for the Organization

There are other questions to consider when identifying the capacity and needs of the *Faith in Action* program. A program based within a community of faith might ask the following:

- How does the *Faith in Action* program compare with other volunteer programs within the congregation?
- How could the congregation involve more volunteers?
- How could the program involve more coalition congregations?
- What programs, projects, jobs or tasks will involve volunteers, either on a long-term or short-term basis?
- What is the congregation's capacity to support the *Faith in Action* program? The strengths and weaknesses of the various congregations will affect the ability to involve volunteers and provide other resources and support.

- What is the program staff's perspective on working with volunteers? A volunteer program is as active as committed staff and volunteers allow it to be. Check your staff's experiences, attitudes and philosophies about working with volunteers so you can find out where they stand. Involve both staff and volunteers in evaluating the volunteer program.

Program Goals for Volunteers

As you develop your evaluation process think about what goals you have for your volunteers. Have you incorporated ways to check on your program's success in meeting these goals within the evaluation process?

Examples of goals for volunteers:

- Joy of serving
- Satisfaction of helping those in need through one's faith
- Education and training
- Working with other dedicated volunteers
- Recognition within the religious and secular communities
- Personal and spiritual growth
- Sense of personal worth to self and community
- Building a network of friends in the church and community
- Gaining a greater testimony of the need for volunteer work through faith programs

With your evaluation team, consider the data collection methods outlined in the table in the next section. Which of these methods of collecting evaluation data might be most effective in assessing your program's success in meeting the goals you identified?

COLLECTING DATA

The following table provides an overview of the major methods used for collecting data during evaluations.

Table 1: Data collection methods*

Method	Overall Purpose	Advantages	Challenges	Type of Evaluation
Questionnaires, surveys, checklists	When you need to quickly and/or easily get information from people in a nonthreatening way	-can be completed anonymously -inexpensive to administer -easy to compare and analyze -can be administered to many people -can get lots of data -many sample questionnaires already exist	-might not get careful feedback -wording can bias responses -impersonal -in surveys, may need sampling expert -does not get full story	Outcomes
Interviews	When you want to fully understand someone's impressions or experiences, or learn more about their answers to questionnaires	-get full range and depth of information -develop relationship with respondent -can be flexible with respondent	-can take much time -can be hard to analyze and compare -can be costly -interviewer can bias responses	Outcomes Impacts
Documentation review	Review of registrations, finances, memos, minutes, tracking forms, annual reports, etc.; when coordinator wants impression of how program operates without interrupting the program	-get comprehensive and historical information -does not interrupt program or respondent's routine in program -information already exists -few biases about information	-often takes much time -information may be incomplete -need to be clear about what is being sought -not flexible means to get data; data restricted to what already exists	
Observation	To gather accurate information about how a program actually operates, particularly about processes	-view operations of a program while actually occurring -can adapt to events as they occur	-can be difficult to interpret observed behaviors -can be complex to categorize observations -can influence behaviors of program participants -can be expensive	Inputs Activities/Process
Focus groups	To explore a topic in depth through group discussion, for reactions to an experience, suggestions or understanding common complaints; useful in evaluation and marketing	-quickly and reliably get common impressions -can be efficient way to get range and depth of information in short time - can convey key information about programs	-can be hard to analyze responses -need good facilitator for safety and closure -difficult to schedule 6-8 people together	Activities/Process Outcomes
Case studies	To fully understand or depict care recipient's experiences in a program, and conduct comprehensive examination through cross-comparison of cases	-fully depicts care recipient's experience in program input, process and results -powerful means to portray program to outsiders	-usually quite time consuming to collect, organize and describe -depth of information, rather than breadth	Impacts

*Adapted from Carter McNamara, "Overview of Methods to Collect Information" (last revision: Feb 16, 1998) from the Free Management Library at http://www.mapnp.org/library. [March 20, 2003]

Indicators

An indicator is a concrete, observable thing that you can measure to represent whatever it is you want to track. For example, indicators of independence among care recipients might be the number of individuals who get to medical appointments on a regular basis or the percentage who report an increased sense of independence.

Research Methods

When selecting a research method, two important considerations are the validity and the feasibility of your methods. Validity means that the data collected is what you purport to collect. Feasibility means that your evaluation plan can be accomplished within your resource constraints.

TIPS

Tips to Increase Validity

- Do a pilot test.
- Collect data from multiple sources and methods (to corroborate findings).
- Make surveys and tests anonymous, if possible.
- Offer as much confidentiality as possible.

Tips to Increase Feasibility

- Use a random sample. A random sample is a sample of subjects that have been randomly selected from a group, and are therefore considered to be representative of that group.
- Use Web surveys. This eliminates extra steps for data entry and compilation.
- Use retrospective questions rather than pre and post- questions.
- Use one instrument to capture information about multiple objectives.
- Hire evaluators only for advising (not for doing the leg work).

Table 2: Pros and cons of various research methods

Advantages	Existing Records (data already collected)*	Focus Groups	Interviews	Observation	Portfolio/ Journal Assessment	Tests	Written Surveys
Anonymous (it is possible for evaluators not to know who the actual respondents are)	X					X	X
Cost-effective (can collect data from many individuals with little administration time)	X					X	X
Easily administered (data can be collected by relatively untrained individuals)	X					X	X
Generalizable (data is representative of entire population, if sampled and collected correctly)			X	X		X	X
Quantitative (collects data that can easily be presented numerically)			X	X		X	X
Probing (follow-up questions can be asked, for greater depth)		X	X				
Rich (collects emotions, subtleties, stories and reasoning well)		X	X		X		

Instruments

An instrument is used to measure something. In evaluation, instruments are usually paper tools, such as surveys, questionnaires or a list of questions for a focus group.

Questionnaires: Before creating the questionnaire, volunteer coordinators should clearly articulate the problem or need to be addressed, so that the information gathered will be useful. Review the purpose for conducting the evaluation and what it will accomplish. This helps focus on what information is needed and what questions should be asked.

Questionnaire Checklist

- ❑ Include a brief explanation of the purpose of the questionnaire.
- ❑ Include a clear explanation of how to complete the questionnaire.
- ❑ Include directions about where to send the completed questionnaire.
- ❑ Note conditions of confidentiality, i.e., who will have access to the information. (Consider using an informed consent form as well.)

Interviews: Interviews are particularly useful for getting the story behind a participant's experiences. The interviewer can pursue in-depth information on a topic. Interviews may be useful to follow up with certain respondents who answered questionnaires. Questions asked during interviews are usually open-ended. Before creating the questions, program coordinators can articulate the problem to be addressed using the information gathered in the interviews. This will help clarify the intent of each question.

Interview Checklist

- ❑ Choose a setting with few distractions.
- ❑ Explain the purpose of the interview.
- ❑ Address terms of confidentiality. Explain who will get access to the answers and how the answers will be analyzed. If comments are to be used as quotes, get written permission to do so.
- ❑ Explain the format of the interview. Explain the type of interview you are conducting and its nature.
- ❑ Indicate how long the interview usually takes.
- ❑ Tell interviewees how to get in touch with you later.
- ❑ Ask for permission to record the interview or bring along someone to take notes.
- ❑ Ask if there are any questions before you start the interview.

Focus Groups: Using focus groups can be a powerful way to evaluate services or test new ideas. Focus groups are interviews of 6-10 people at the same time in the same group. To prepare for a focus group:

- Identify the major objective of the meeting.
- Carefully develop five or six questions.
- Plan your session.
- Call potential group members to invite them to the meeting.
  Send a follow-up invitation with a proposed agenda, session time and list of questions the group will discuss. Plan to provide a copy of the report from the session to each member.
- A few days prior to the session, call and remind each member to attend.

Focus Group Checklist

- ❑ Develop five or six questions—the limit of what you can probably cover in a session that lasts one to one-and-a-half hours.
- ❑ Always identify the problem or need to be addressed by the information gathered during the session—for example, examine if a new service or idea will work, further understand how a program is failing, etc.
- ❑ Think of focus groups as multiple interviews. Many of the guidelines for conducting focus groups are similar to conducting interviews.

Surveys: Conducting surveys is a formal evaluation method and is an effective technique for collecting data via the telephone and/or mail.

Survey Checklist

- ❑ Surveys are best designed with expert input.
- ❑ Mail surveys or, if appropriate, put them online.
- ❑ Provide an incentive for returning or completing the surveys, such as a *Faith in Action* pin.

See the Volunteer Satisfaction Survey in Appendix 9A at the end of this chapter.

TURNING DATA INTO RESULTS

Aggregating Data

Once you have collected the data, it is important to bring it all together and summarize it. Quantitative data, in particular, needs to be put in some sort of order if it is to provide usable information. Qualitative data is usually not aggregated, beyond putting it all in one location.

Below are some basic steps for aggregating data:

- Plan how you want to report the data in each question or item. (Usually, averages or means, frequencies and percent frequencies will be sufficient for statistical reporting of your data.)
- Clean and organize the data. Eliminate instruments that are substantially incomplete, nonsensical and otherwise unsound. Take note of how many you eliminated and why; you will want to have this information easily accessible. It is best to assign ID numbers to

instruments. This will help keep them organized and minimize processing. Also, at this point you may want to match pre- and post-completed instruments.

- Code and compile data. Assign a numerical value to each possible answer. It is easy to do this on a blank instrument and have it serve as a master. Tabulate and record each response pre- and post- by record. It is important to link pre- and post- responses for the same case. Spreadsheet software is very useful for coding and compiling data.
- Calculate means, frequencies and percent frequencies. This is usually sufficient for most reporting.
    - Mean: The average response (e.g., 2.3 on a 5-point scale)
    - Frequency: The number of specific responses (e.g., 60 "yes" responses and 40 "no" responses)
    - Percent frequency: The percentage of specific responses (e.g., 60% responded "yes" and 40% responded "no")

Analyzing Data

The usefulness of the data is in the interpretation. Once data is compiled, you can decide what it is telling you. (What is working? What is not working?) When analyzing data, always start with a review of the evaluation goals—that is, the reason the evaluation was conducted. This helps to organize the data and focus the analysis.

- If the goal is to improve the program by identifying its strengths and weaknesses, organize the data into program strengths, weaknesses and suggestions for improvement.
- If the goal is to conduct an outcomes-based evaluation, categorize data according to the indicators for each outcome.

TIPS

Interpreting the Meaning of Data

Quantitative Data

Only three statistics are needed to describe in basic terms what the data indicate: mean (average), frequency and percent frequency.

- In outcome evaluations, present these statistics as "before and after" program results.
- To publish results, you must prove causality or draw policy-level conclusions from the data collected. This requires an understanding of statistical analysis. Try to get a graduate student to take this on as a project or find a knowledgeable person from the board, coalition, volunteer pool or community at large to assist with the analysis.

- Make copies of your data and store the master copy. Use copies for making edits, cutting and pasting, etc.
- Tabulate the information. Add up ratings, rankings, "yes" responses, "no" responses, etc.
- For ratings and rankings, compute a mean, or average, for each question. For example: "For question #1, the average ranking was 2.4." This is more meaningful than simply reporting the number of respondents who gave a ranking of 1, 2, or 3.
- Convey the frequency of answers as well. For example: "Twenty people gave a ranking of 1, 30 gave a ranking of 2, and 20 gave a ranking of 3."

Qualitative Data

- Use qualitative data as a way to add depth and context to the dry quantitative data.
- Read through all the data.
- Use simple categorization to analyze qualitative data in quantitative form. Ask open-ended questions and subsequently categorize the answers as part of the analysis and report as frequencies or percent frequencies.
- Organize comments into similar categories (e.g., concerns, suggestions, strengths, weaknesses, similar experiences, program inputs, recommendations, outputs or outcome indicators).
- Label categories or themes (e.g., concerns or suggestions).
- Attempt to identify patterns, associations and causal relationships in the themes (e.g., all people who attended programs in the evening had similar concerns, most people came from the same geographic area or most people were in the same salary range).
- Keep all commentary for several years after completion in case it is needed for future reference.

USING RESULTS

Publishing Results

- Choose a simple format. Select the best format for the audience and the message the program wants to deliver. Some choices include a flyer, memo, newsletter article, annual report, poster display or summary of the results on the actual survey instrument.
- Use charts, graphs or other visual representations to make the results easier to understand.

- Provide basic information on how the data was collected and have details available for any reader who is interested.
- Report both quantitative and qualitative data.
- Be honest. It's okay not to show results. Most people know that the changes the volunteer program is trying to effect are difficult to achieve. They do not expect dramatic results.

Publicizing Results

Consider following these steps for reporting evaluation results:

- Calibrate the level and scope of the content, based on who will be reading the report (e.g., funders, board, coalition members, volunteers, general public or care recipients).
- Review and discuss the report with program volunteers. Translate recommendations into action plans and determine who will do what by when.
- Provide an executive summary at the beginning of the report for funders and others who require a quick overview. (An executive summary covers conclusions and recommendations; the table of contents lists the sections of information in the report.) Reports to funders should also include a description of the organization and the program under evaluation; explanation of the evaluation goals, methods and analysis procedures; listing of conclusions and recommendations and any relevant attachments, such as questionnaires or interview guides.
- Record the volunteer evaluation plan and procedures in an evaluation file, which can be referenced for future program evaluations.

Improving the Volunteer Program

Faith in Action program evaluations should be part of an active process of identifying desired outcomes, owning these outcomes, measuring results and using the results in decision-making and program improvement. Program directors cannot just put goals, outcomes and indicators on paper. The board, the program director and other stakeholders must use the results to improve programs, make management decisions and report the program's impact to their volunteers, congregations, coalitions and leadership. For every action and decision that is based on the evaluation results, the primary question should be: "How will this improve our *Faith in Action* program?"

Appendix 9A

Volunteer Satisfaction Survey

This questionnaire explores how volunteers at *Faith in Action* feel about their experiences. Please give careful consideration as you complete this questionnaire. Your responses are important to providing a framework for understanding what *Faith in Action* does well and opportunities for improvement in our continuous quest to improve our volunteer management practices. Your responses are anonymous.

SECTION 1: Volunteer Activity

1. Please check one of the following statements that describes your participation with the *Faith in Action* program.

   ❑ I am currently an active *Faith in Action* volunteer. I volunteer an average of ____ hours a month.

   If you are not an active volunteer, please indicate the statement that best describes you and complete other questions as you determine applicable.

   ❑ I am an inactive *Faith in Action* volunteer who is taking a break.

   ❑ I am a former *Faith in Action* volunteer who does not plan on becoming active again.

   ❑ I trained to become a *Faith in Action* volunteer, but never became active.

2. When did you become a *Faith in Action* volunteer? ___________________

3. Indicate the one volunteer position or role to which you devoted the most time in the past year. ____

4. Who is/was your volunteer team leader or supervisor? ___________________

SECTION 2- Volunteer Experience

For each statement, mark the box that most closely represents your experience with *Faith in Action*.

	strongly disagree	disagree	neutral	agree	strongly agree
1. I am well utilized as a volunteer.					
2. I am recognized when I do a good job.					
3. I participate in the decision making for the volunteer program in which I am most involved.					
4. The staff encourages me to work to my full potential.					
5. My team leader or supervisor gives clear direction in my work.					
6. As a volunteer, I feel well prepared to do my work.					
7. The role of volunteers is appropriately valued in this *Faith in Action* program.					
8. Staff members give useful and constructive feedback.					
9. I am comfortable approaching my team leader or supervisor with problems and/or concerns.					
10. People here try to resolve differences constructively.					
11. People in my program constantly explore new and better ways of doing things.					
12. Staff share important information and facts in a timely manner.					
13. Volunteer team members share important information and facts in a timely manner.					
14. My team leader or supervisor helps me improve my performance.					
15. I am offered variety in the work I do.					
16. I get satisfaction from my volunteer services.					
17. I have opportunity to learn new skills or do new things.					
18. I am respected and valued as a volunteer.					
19. Staff members value and respond to my feedback and opinions.					

SECTION 3: Additional Comments

Please indicate how you most like to be recognized for your volunteer contributions.

What would make your volunteer experience more satisfying?

Is there anything else you would like to share with us about your experience as a volunteer with *Faith in Action*?

Please complete the following demographic information so that we can determine whether or not the people who respond to the survey are representative of the people who make up our volunteer force.

_ Male _ Female Age ________

Please indicate the racial, ethnic or national group you use to describe yourself.
____

When you have completed the questionnaire, please return it to:
[person]
[address]
[city, state, zip]
by _______________ [deadline]

Thank you for taking the time to complete this questionnaire.

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