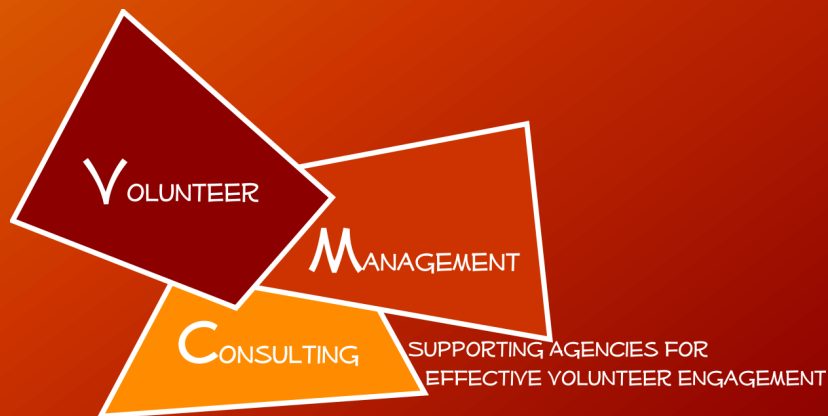


# Volunteer Engagement Essentials: Building Infrastructure to Support Volunteers

**Presenter: Traci Lato-Smith, CVA  
Volunteer Management Consulting**





Traci Lato-Smith, Owner & Principal Consultant,  
Volunteer Management Consulting

***Helping organizations build infrastructure  
for sustainable volunteer programs***

- Customized professional development for new volunteer coordinators
- Volunteer database support, with a specialty in The Raiser's Edge
- Project-based contract work to support all aspects of volunteer engagement
- Interim volunteer management for organizations in transition



## Experience & Clients:

- Boomers Leading Change in Health
- Colorado Healthcare Directors of Volunteer Services
- Environmental Learning for Kids
- Denver DOVIA (Directors of Volunteers in Agencies)
- The Denver Hospice
- Denver Scholarship Foundation
- DOVIA of Weld County
- Colorado Main Street
- Denver Regional Mobility and Access Council (DRMAC)
- Jewish Family Service
- K9 C.A.R.E.S.
- Kavod Senior Life
- Metro Volunteers
- Project PAVE
- National Conference for Community and Justice
- St. Louis NORC (Naturally Occurring Retirement Community)
- University of Maryland, Baltimore County

# INTRODUCTIONS



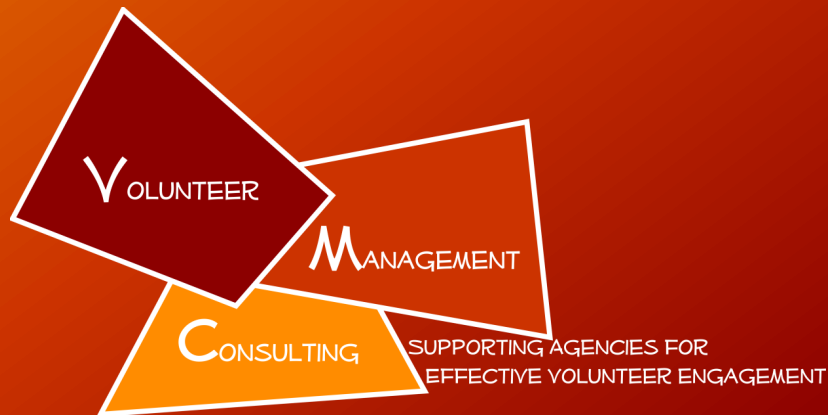
- Show of hands...
  - Have you been a volunteer?
  - Have you had a good experience?
  - Have you had a frustrating experience?





Volunteer engagement should be a **mutually beneficial experience** for the volunteers *and* the agency.

# Volunteer Program Design: Building the Infrastructure



# SUCCESSFUL VOLUNTEER ENGAGEMENT



A well-designed program that ensures your volunteers have a **positive experience from their first point of contact** fosters multifaceted investment and sustainability in countless ways.

# SUCCESSFUL VOLUNTEER ENGAGEMENT



## Volunteers are...

- (More than just) Free Labor
  - They build capacity
- Potential Donors
  - Never assume that a volunteer is “just a volunteer”
- Great PR!
  - They will be ambassadors for you (good or bad)
  - We want to give them the kind of experience that makes them go out and say positive things about where they volunteered!

Why do we silo our constituents?





# PIECES OF THE PUZZLE



→ Needs and Program Assessment

→ Position Descriptions

→ Intake and Screening

→ Orientation and Training

→ Recruitment

→ Managing Requests & Assignments

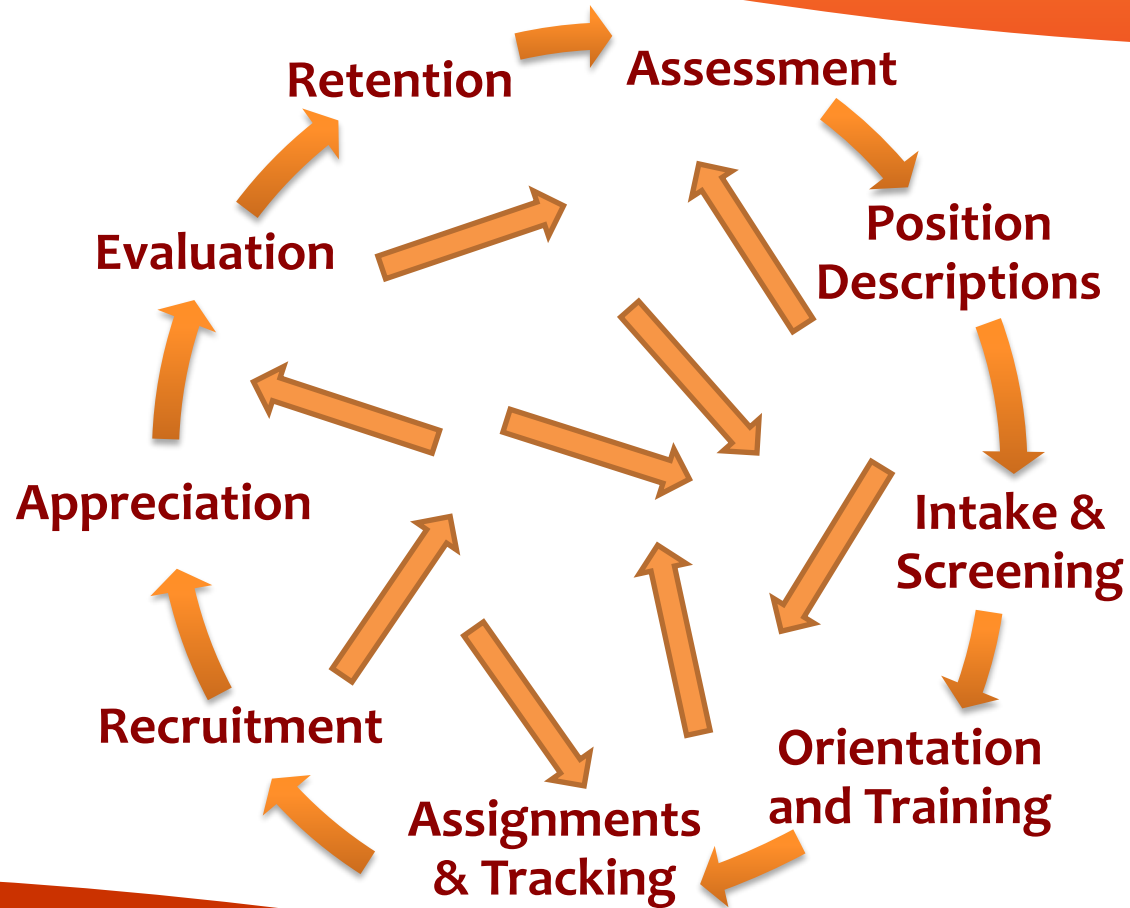
→ Appreciation

→ Evaluation

→ Retention



# INTERCONNECTEDNESS

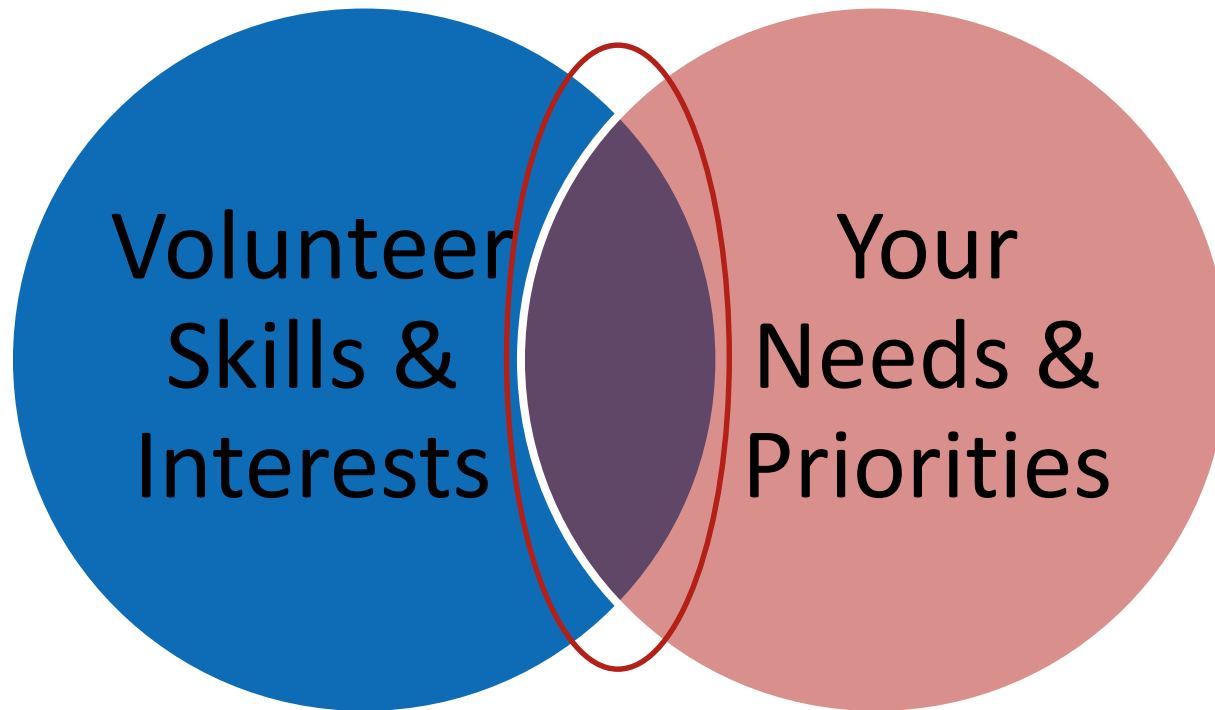


# Needs and Program Assessment



# NEEDS & PROGRAM ASSESSMENT

## Why conduct a needs assessment?



# NEEDS & PROGRAM ASSESSMENT



## Why conduct a needs assessment?

1. How *do* we use volunteers?
2. How *can* we use volunteers?
3. What are our goals for our volunteer program?
4. What are the benefits to our organization and our work?
5. What are the costs?
6. What is/should be the culture of volunteerism at our agency?

# NEEDS & PROGRAM ASSESSMENT

## How do I conduct an assessment?

1. Meet with all or at least a key sampling of your stakeholders
2. Meet collectively to discuss goals and fears
3. Assess current volunteer engagement and possibilities
4. Shift mindset from  
“Doing the work” to “Getting the work done”
5. *Dream Big!*



# NEEDS & PROGRAM ASSESSMENT



The current landscape...		Close our eyes and imagine...	
Activities that Must Be Accomplished	Activities Not Being Accomplished	Activities We'd Like to Accomplish (The "Wish List")	Activities Volunteers Can Help Us Accomplish

# *Position Descriptions*





# POSITION DESCRIPTIONS



## Why?

1. Clarify roles – reduce ambiguity and confusion
2. Manage expectations
3. Establish the basis for supervision and evaluation
4. Provide meaning and purpose
5. Promote good working relationships with paid staff
6. Support recruitment



# POSITION DESCRIPTIONS



## Key Components of Effective Volunteer Position Descriptions:

1. Position Title
2. Mission and Purpose
3. Responsibilities and Specific Duties
4. Qualifications
5. Time Commitment
6. Work Location
7. Training
8. Benefits
9. Application and Screening Procedures
10. Volunteer Supervisor and Contact Information
11. Signatures



# *Intake & Screening*



# INTAKE & SCREENING



- What happens when potential volunteers contact you?
  - If they email or call you directly?
  - If they call your organization's main line?
  - If they email a generic email address from the website (info@youragency.org)?
  - If they use an online form through your website?
  - Who do these messages go to, and how long does it take to get there?
- What is your response time?
  - Create templates for inquiry replies – make it easy for yourself!
- What is the next step for interested volunteers?
  - Volunteer Position Description?
  - Volunteer Application?
  - Volunteer Orientation?
  - Or do you immediately inundate them with urgent needs?

# INTAKE & SCREENING



## What information do you collect, and at what point?

- Application?
- Interview?
- Reference Check?
- Background Check?
- Orientation?
- Training?
- Competency Evaluation?
- Skills and Interests?
- Certification Documentation?
- Volunteer Agreement or Contract?
- Supervision Plan?
- Ongoing Evaluation?

## What information do you provide, and at what point?

- Expectations and Required Commitment
- Basic Qualifications
- Overview of your organization/volunteer program

## Risk Management

1. Background Checks
2. Liability Insurance
3. Interviews
4. References
5. Policies and Procedures
6. Rules and Regulations
7. Volunteer Agreement or Contract
8. Training
9. Supervision
10. Ongoing Evaluation



# SCREENING & RISK MANAGEMENT

## Determining Necessary Screening

- Will this volunteer **interact with vulnerable populations** (children, older adults, differently abled members of the community)?
- Will this volunteer **be alone with vulnerable community members**?
- Will this volunteer have **access to money or financial information**?
- Will this volunteer have **access to sensitive information such as billing or other contact information** for members of our community?
- Will this volunteer have **unsupervised access to valuable supplies and/or sensitive documents** or information?
- Will this volunteer have **access to technology accounts** including the website, database, or mass communication/social media accounts?
- Will this volunteer be **driving** on behalf of your organization?



# Orientation & Training





# ORIENTATION AND TRAINING



## What's the Difference?

- **Orientation** = Organizational Overview and Big Picture Volunteer Program Information
  - Opportunity for volunteers to get information and determine if they're interested
  - Collect paperwork
  - Conduct/schedule interview
  - Involve other staff members to present
- **Training** = Job-Specific Information
  - After attending an orientation, this provides more detailed information and concrete training for specific tasks/projects
  - Can be a formal group training or one-on-one as needed
  - Need staff who will be supervising projects to contribute the content

# ORIENTATION – SAMPLE AGENDA



6:00-6:05 – Welcome and Sign-in

6:05-6:10 – Agenda and Introductions

6:10-6:30 – Your Organization 101: An Introduction to Your Organization

- Video
- Background Information
  - Need/Challenge/Statistics
  - Mission
  - History
  - Overview of services/org structure
- Context – how volunteers contribute to the big picture

6:30-6:50 – Volunteer Opportunities and Expectations

- Job descriptions and commitments
- Volunteer Bill of Rights
- Volunteer Rules and Regulations
- Paperwork (Intake Forms)
- Next Steps
- Thank You!

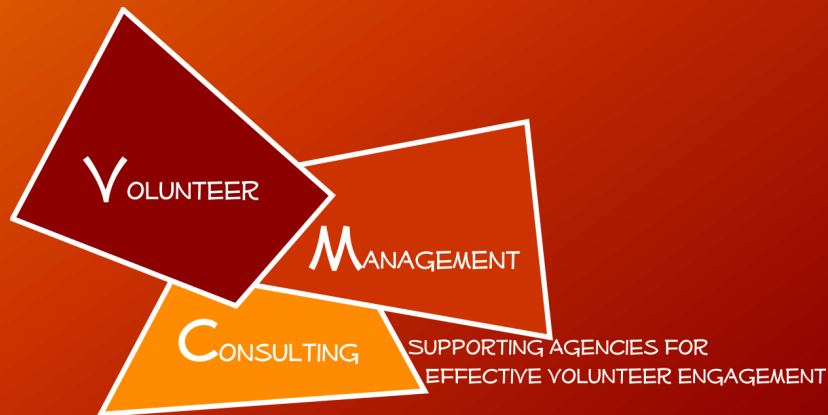
# TRAINING



Draw a tree...



# Volunteer Program Implementation: Engaging Volunteers



# *Recruitment & Cultivation*



# RECRUITMENT



Recruitment is the act of identifying groups and individuals for service, ***and then actually asking them to volunteer.***

Rehnborg & Clubine  
“Volunteer Recruitment: Tips from the Field”

# ASK!

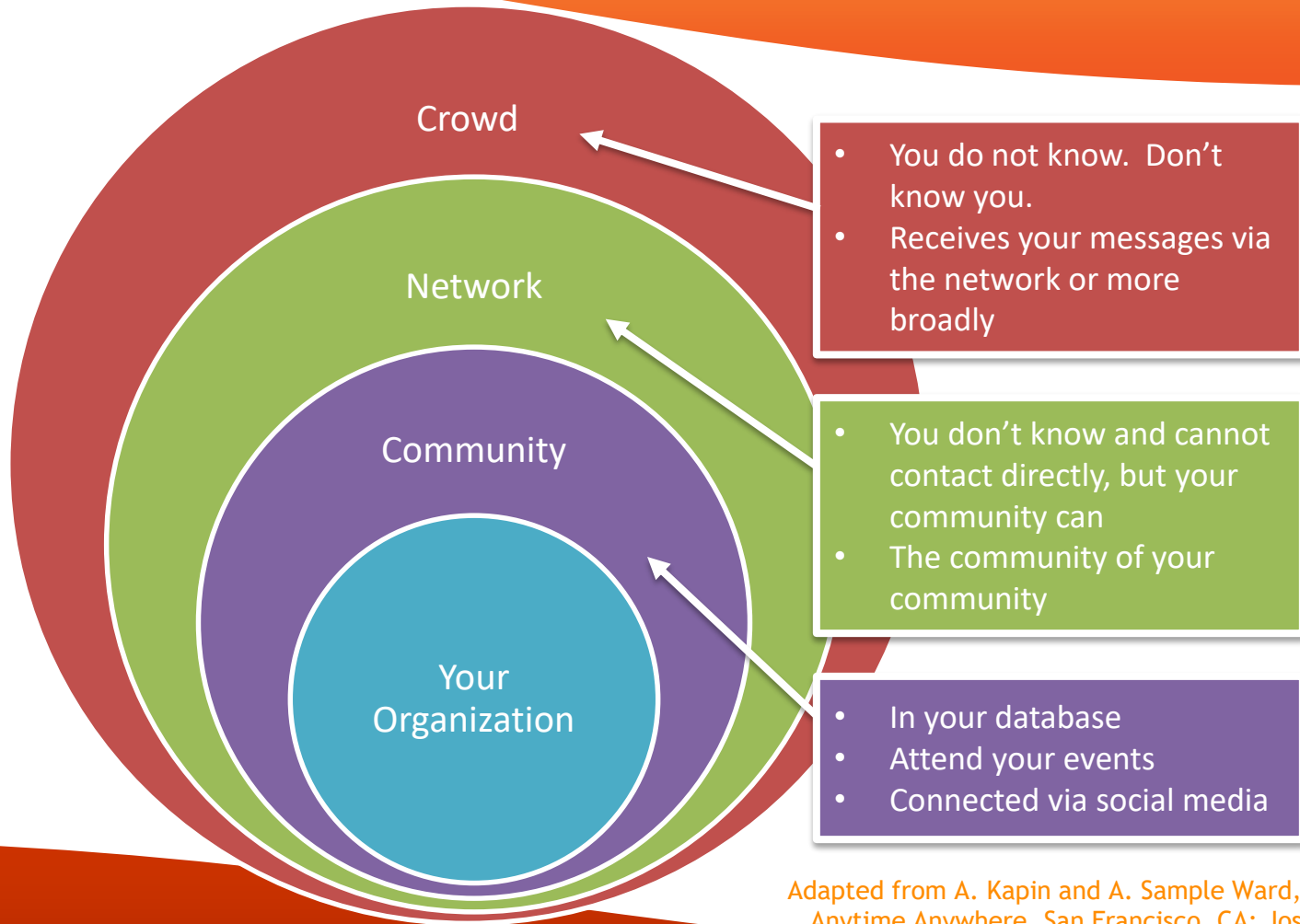
- #1 reason why people don't give?  
*Because they are never asked!*
- Ask people to do a specific job
- Don't say "no" for them

Adkins, Lauren. "Managing Volunteers for a Stronger Main Street Program."

*Main Street News.* February 1996.



# SPHERES OF INFLUENCE



Adapted from A. Kapin and A. Sample Ward, *Social Change Anytime Anywhere*. San Francisco, CA: Jossey-Bass, 2013



# IDENTIFYING YOUR TARGET RECRUIT

1. Who would have the skills and interest to do this assignment?
2. Where will you find them? Who knows them?
3. What information will the prospective volunteer need to make an informed decision?
4. What information will you need to make this placement?
5. Who are your potential recruiters for this assignment and how will you train them to do recruitment?
6. How will you track the effectiveness of recruitment?



# CRAFTING YOUR MESSAGE

In just a few sentences (or less) each, describe:

1. Mission of Organization
2. Purpose of Position
3. Tasks and Commitment

*Start with the impact of this volunteer role!*



# IDENTIFYING YOUR NEEDS



- How many volunteers do you currently have?
- How many volunteers do you need?
- How many volunteers *can you handle*?
  - *Think not only about how much need you have for volunteers, but also your capacity to manage them all!*
- How much recruitment do you need to do?
  - Set realistic expectations for your recruitment efforts - don't be disappointed when volunteers aren't flooding in
  - A steady “trickle” of committed, reliable volunteers is very often all you need

# IDENTIFYING YOUR TARGET RECRUIT



## Who are you looking for?

- Picture your superstar volunteer
- How did you get that person?

## Where might you find them?

- Are your clients also current/potential volunteers?
- Are they still working? – look to corporate volunteer outreach
- Are they retired? – present to retiree groups

## Who finds your cause compelling?

- Your Board members?
- Your clients' family members?
- Your neighbors? Your clients' neighbors?
- Religious communities

# RECRUITING TIPS



- Your Website
  - How prominently featured are volunteer opportunities?
  - How many clicks does it take to get to volunteer information?
- VolunteerMatch.org
- Your Local Volunteer Center
  - Metro Volunteers in Denver
- Your Newsletters and E-Newsletters



# *Managing Requests and Volunteer Assignments*



# ROLE CLARIFICATION



## ➤ Management vs. Supervision

- **Volunteer Management:**

- Provide a positive experience from the first point of contact
- Orientation – “Big Picture” info about your organization and where volunteers fit in
- Screening and Placement
- Support (for staff *and* volunteers)

- **Volunteer Supervision:**

- Planning and instruction for specific projects
- Onsite point person and supervisor
- Project-specific training
- Ongoing check-ins and feedback

# GENERATING EXCITEMENT



- Meet with existing staff
  - One-on-One to really get to the heart of their ideas for volunteers *and* their concerns
- Meet with new staff when they start
  - Formal orientation to your volunteer program – they are the easiest to get excited
- Meet with staff in department groups
  - Facilitate brainstorming and discussion about how things *are* going and how things *could* go



# SYSTEMS FOR VOLUNTEER REQUESTS



- What happens when staff contact you to request volunteers?
  - What is your response time?
  - What is your process?
    - If it's an existing volunteer position/role
    - If it's a new project
  - What is your turnaround time on filling the request?
  - What is staff and volunteer satisfaction level?
- Create systems – make it easy for yourself!

# VOLUNTEER REQUEST FORM



1. Name
2. Date
3. Project Name
4. Task you need completed
5. Number of Volunteers
6. Ongoing or One-Time Volunteer Opportunity
7. Amount of Time
8. Timeline/Deadline
9. Additional Notes

# SETTING VOLUNTEERS UP FOR SUCCESS



- Detailed Instructions
  - Including context – Make sure they know why
- Supervision and Support
  - Make sure your volunteers know who to go to with questions, problems, concerns (of all types) - might be different people –
    - Volunteer Manager/Coordinator for bigger picture volunteer concerns
    - Supervisor for content questions

# MANAGING VOLUNTEER ASSIGNMENTS



← Spectrum of Experience →



**Come in, do filing, leave.**

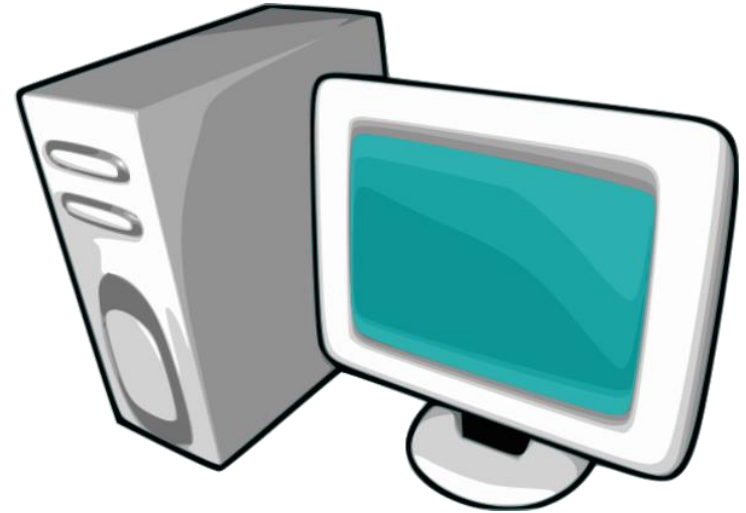
**When someone asks what they did, they say “I did some filing for some nonprofit downtown.”**

**Learn about your organization, learn about what this project is all about and how it contributes to the larger mission.**

**When someone asks what they did, they say “I helped the Denver Scholarship Foundation process scholarship applications for low-income students to go to college in Colorado...”**

- **What is the state of your volunteer database?**

- Contact Information
- Special Skills
- Interests
- Intake Forms and Screening Elements
- Current Assignments
- Hours Tracking
- Querying
- Reporting



- **Is volunteer data separate from donor and client data?**

# *Appreciation & Recognition*



# RECOGNITION & APPRECIATION



- Do your volunteers feel valued and appreciated?
- Is appreciation of your volunteers both formal and informal?
  - **Formal Appreciation:**
    - Appreciation Event(s)
    - Thank you cards
    - Appreciation gifts/gift cards
    - Newsletter recognition
  - **Informal Appreciation:**
    - “Thank you” in *every* communication you have with volunteers

# RECOGNITION & APPRECIATION



- Are your appreciation efforts meaningful to your volunteers?
  - Is your event a relic?
  - Have you asked your volunteers how they would like to be appreciated?
  - Are your appreciation efforts a good use of your organization's resources? Do volunteers agree?
- Do you recognize volunteers alongside of staff?
  - They are teammates!
- Do you share results?
  - Make sure volunteers know they've made an impact!

**Happy, valued and appreciated volunteers stay with you and say good things about volunteering with you!**



# Evaluation



# EVALUATION



- Evaluation can be...
  - a planning tool
    - Evaluation questions about this event should inform how volunteers are utilized, scheduled and organized for the next event
    - Evaluation questions about appreciation should inform budgeting and planning for volunteer recognition and appreciation next year
  - a learning tool
    - What questions do you want and need answers to?
- Evaluation is not about criticism, though it can be constructive



## Do you create opportunities for...

- Volunteers to **provide feedback about their role** and the ways they would like to be involved?
- Volunteers to **assess their own skills and interests** on an annual or regular basis?
- Volunteers to **suggest ideas for improvements** and increased efficiencies in operations and programs?
- **Staff to provide the same feedback, ideas and self-assessment** with respect to their involvement with the volunteer program?



- **Volunteer Surveys**

- Conduct evaluation interviews
  - Year-End and/or Mid-Year Check-Ins
- Collect quantitative and qualitative data
  - Feedback / ideas for improving the program or event
  - Recruitment suggestions
    - Actual names and contact information of people they know who might be good volunteers
  - Online survey after event, written evaluation form at event, simple follow-up email with a few questions to answer, phone call survey
- Measure and report impact

# Retention



# RETENTION



- Are your volunteers sticking around?
- Are your volunteers happy? Why/why not?
- Are you following up with those that leave to find out why?
- The professionalism of each aspect of your program impacts retention!



- Measuring Retention

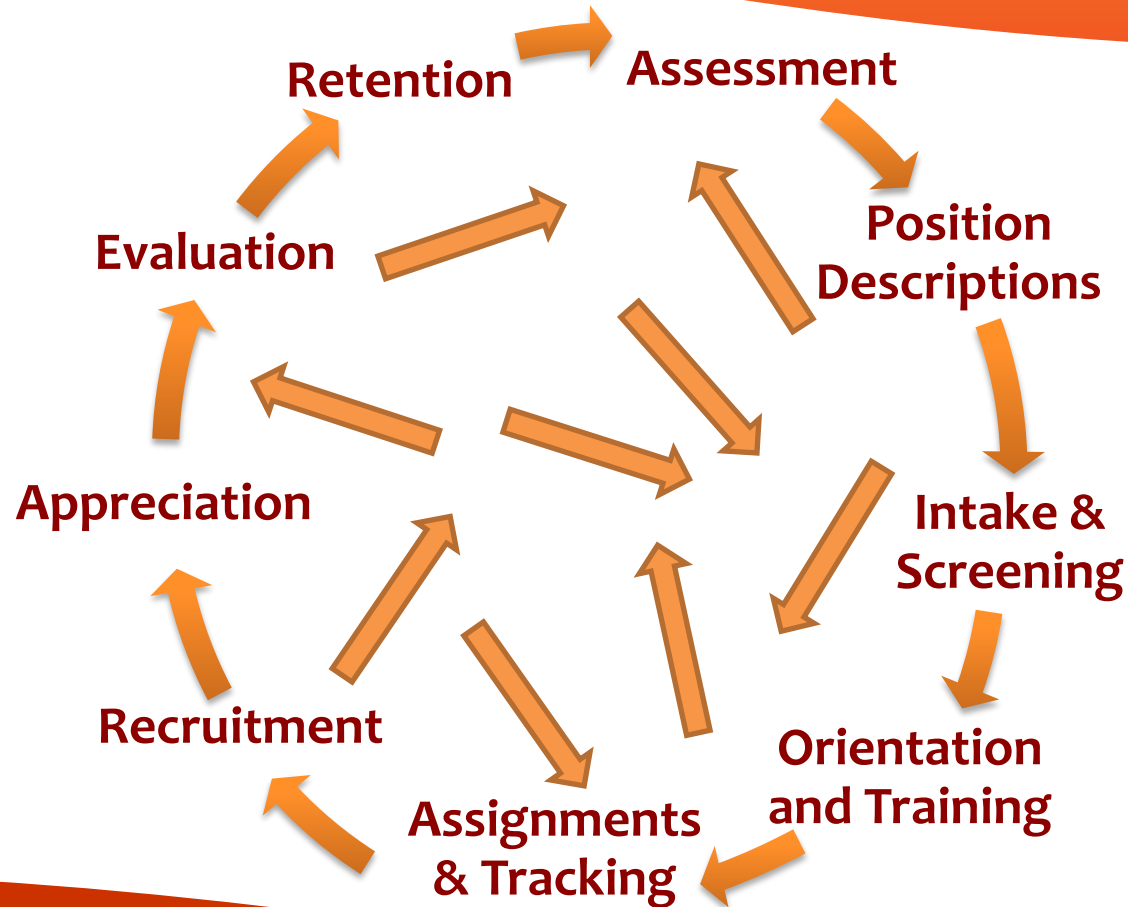
- No best practice metric for retention
- How do you define retention?
  - *“The percent of volunteers who have fulfilled the commitment that they made.”*  
([Volunteer Engagement 2.0](#). John L. Lipp. “Chapter 7: Keeping the Volunteers You Have”.)
- If you have 10 people at an orientation and 6 apply, that means that those 4 opted out because they knew it wasn’t a good fit before you invested in them
- Come up with your definition of retention, and work toward maximizing that for your organization

# Wrap Up





# INTERCONNECTEDNESS



# WRAPPING UP...



Questions?



# Thank You & Good Luck!

*Please contact VMC if you would like assistance implementing any of your ideas from today!*

**Traci Lato-Smith, CVA**

**Volunteer Management Consulting**

**[traci@volunteermanagementconsulting.com](mailto:traci@volunteermanagementconsulting.com)**

**720.446.6862**

