

DOCUMENTING VOLUNTEER PARTICIPATION: Recording and Reporting Techniques

As a volunteer administrator, when you document the participation of volunteers in your agency, you perform a vital service that benefits everyone involved. Utilized as a management function, the record-keeping of volunteer service provides information that can be used to evaluate individuals, to assess programming, to plan for agency development and to provide feedback to the community about the value of services. (See "For the Record: Effective Volunteer Management Through Documentation," fall 1988 VAL.)

Understanding the merits of this function is a step in the right direction. To turn theory into practice, however, you must adopt a method of documenting participation that is useable, practical and efficient. If it's not, your efforts will end in frustration.

There are four major steps to follow when developing a system for documenting the services of volunteers:

1. **Define** what to document.
2. **Record** volunteer participation.
3. **Collect** the data.
4. **Report** volunteer services.

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Defining Documentation

Documenting the participation of volunteers can mean different things. This term generally implies that an accurate record is kept of what volunteers do in an agency and how often they do it. Exactly what kinds of information are documented about volunteers vary by agency and individual. Records of volunteer service are sometimes based solely on numbers of hours contributed.

Your efforts at managing information about volunteers can involve a more thoughtful, systematic approach to record-keeping, however, which includes important demographic information, the types of jobs that the volunteers perform, how often they volunteer and the economic and organizational value that their contribution makes to the agency.

This larger definition of volunteer documentation is needed to use record-keeping as a management function. It can mean the difference between a successful volunteer program and one that is stagnant and unresponsive to the agency, the volunteer and the entire community. The time you invest in the establishment of your volunteer documentation system will reward you again and again as you are able to ascertain an accurate picture of what volunteers do for your organization.

One of the most important components of any information management system for volunteers is the individual personnel file. The creation of this file, and the determi-

nation of what it should contain, is one of the first steps toward setting up your documentation system. Minimally, the volunteer's personnel file should provide important information about what services they perform, what department or service they participate in, who their supervisor is and when they began service.

The file may also contain a number of different documents and forms, including a completed volunteer application, letters of reference, an agreement of confidentiality, emergency contact names and numbers, pertinent medical information, evaluation forms, supervisory records, award and recognition information, as well as an up-to-date record of the total number of hours contributed to the agency. Keep in mind that you want to have information in the file that is useful to you and to the volunteer. If it is not, you are simply pushing paper.

Not to be overlooked in each volunteer's file is the job description—one of the most important components of the volunteer personnel file. It is the qualitative record of what the volunteer has done and continues to do for your agency. A volunteer job description should contain all of the same information that would be found in job descriptions for paid staff, including the volunteer's title, department, supervisor, schedule, description of duties, specific tasks and responsibilities, qualifications, and the length of commitment required for the position.

Beyond being informative, the job description also provides liability protection for you and your agency. It clearly documents the tasks, duties or functions that you have assigned to the volunteer, and that the volunteer has agreed to perform as a representative of your organization.

The merit of the job description in documenting volunteer participation will also be apparent when you prepare your reports. Without it, your records of the number of hours contributed will tell only part of the story about what volunteers do for your agency.

Finally, the personnel file and job description should, according to accepted legal counsel, be kept by your office for a period of three years after the volunteer leaves your agency. This ensures that pertinent information about them will be available should they request a reference or otherwise require some information. You should consider using the guideline of handling volunteer files as you would files for paid staff, keeping them confidential, protected and up to date.

Recording Volunteer Services

An important distinction needs to be made between the "recording" and "reporting" of volunteer participation. "Recording" pertains to the act of writing down the time or service contributed by each volunteer on a day-to-day basis. On the other hand, "reporting" volunteer participation is an administrative task that involves compiling information about the number of service hours and the duties of all of the volunteers involved in your agency, cumulatively and individually. This information is then presented in a written or oral form to the management of the agency, its board of directors and administrators.

Three important issues must be considered when devising a system for recording volunteer hours: ease, utility and accessibility. Whether it is you or the volunteer who is responsible for doing the day-to-day recording of hours, it won't get done if it isn't easy to understand and use.

The medium used to record the participation of volunteers may be simple in format or very sophisticated. Some options might include the use of post-it notes, a loose-leaf sign-in sheet, a clipboard, a blackboard, personal time cards, a three-ring binder with individualized pages, notebooks or diaries, mileage forms, client service forms, a tape recorder or message machine, a personal computer, or anything else you may find suitable.

Although each type of system has its own merits, the use of individual cards or forms which you can then place into each personnel file will save you the additional step of re-recording the information to insert it into each volunteer's file. Whatever method you choose, the pertinent information that you want volunteers to record should fit into the space you provided. Also be sure to provide a format that will minimize reporting errors. As long as you get the information, your system doesn't have to be fancy, it just has to be usable.

Regardless of the method you use to record volunteer services, unless you have a tremendous amount of time on your hands, the day-to-day users of the recording method should be volunteers them-

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selves. However, you will want to make sure that your format is self-explanatory. If lengthy training time is required, chances are that the system won't be easy for the volunteers. In addition, it won't be easy for you to get data from your system if it is so sophisticated that errors continually plague the reports. Beware of using methods that have the potential to provide you with a lot of information at the expense of clarity and ease. You can almost guarantee that the resultant data will be incomplete, and therefore, not usable.

Utility is another major factor to be considered. Your system must not only be usable by you and the volunteers, it must also provide all of the data you need. You

will want to be able to retrieve the information in a way that suits how you want to report it. In other words, you need to envision the documentation system as a whole, and brainstorm the types of information that might be useful to your program before you take the step of determining how you will ask volunteers to record their hours.

For example, if it is important for you to assess the days of the week that are particularly underserved by volunteers, you may want to create separate recording forms for each day of the week. This will help you directly assess a need for scheduling changes. If you need to know the number of clients that are served by each volunteer, during their shift as well as cumulatively for the month, you might choose to leave a space on the volunteer's time sheet for this tally, rather than doing a time-consuming review of client records.

Accessibility to the system is also critical. Even if the method you designed is understandable and easy to use, if the volunteers can't get to it, it won't be efficient. How you choose to have volunteers record their time will vary greatly depending upon whether they do tasks out of their homes, at various offices, or congregate at a central location. For those volunteers doing work in the field or outside of a traditional office setting, this might mean that the recording forms will have to be kept with them, perhaps in their cars, or at their homes or offices.

If your agency has one or more buildings where volunteers serve, it is essential to designate a specific space in each building or department where all volunteers could sign in and keep their records. This room or desk where volunteers record their hours should be in an area that is easily accessible without interrupting staff or clients. Safety of the records is imperative, as is privacy, since these records document how much service is being given to your agency, and by whom.

You will want to make sure that the general public cannot peruse the records, as some volunteers may not want anyone outside of the program to know that they are involved. You owe it to them to protect their privacy. Also, be sure that the records are protected from clients and small children and that they will not be disturbed, lost or stolen by mischievous or careless individuals. An additional safeguard is to have the recording system be clearly marked as service records for volunteers, in order to prevent coworkers from mistaking it for something else.

Collecting the Information

Once you have decided on a system of recording volunteer services, determining the method for gathering the data on a periodic basis is not as easy as it may seem. Some creative thinking may be required, depending upon the specific conditions existing at your agency.

This task should not be too difficult if your organization is housed in one building in which all of the volunteers work. On the other hand, if you have multiple locations at which volunteers are placed, or if some of your volunteers do all of their service in the field, you will have a harder time collecting their records. In this case, self-addressed, stamped envelopes distributed on a regular basis to the volunteers will help them maintain the responsibility of sending in their forms. However, the cost involved in this method may prevent you from adopting this approach in your agency. Another tactic might be to coalesce volunteers for weekly, monthly or quarterly organizational or educational meetings, at which time you could collect their records. Alternatively, you might consider enlisting the services of a fellow staff member or volunteer to gather the information for you.

Of course, it is also possible for you to collect each volunteer's record of services by telephone. However, this time-consuming method of gathering information requires that you do it on a regular basis, and it is not particularly efficient unless you are able to incorporate this task into your management routine successfully.

Reporting Volunteer Participation

There are a multitude of ways to report volunteer services. The number of volunteers in your program and the total number of hours contributed by them are an obvious starting point, but you can also focus on the number of clients served by volunteers, the dollar value of these services to your agency, as well as the number of volunteers in each specific task or duty. Keep in mind that you won't be able to report the latter figure without a job description for each person. Also, if you wish to track volunteer services by task or function, the job description for each volunteer must be assessable. This means that it not only must be placed in their personnel file, but preferably noted on their sign-in forms as well. This will eliminate the continual need to refer back to another source of information when compiling data about each volunteer.

Volunteer services can be further bro-

ken down into the different departments where volunteers work, their schedule and the average number of hours that each volunteer provides to the agency per week, month and year. The length of time that volunteers are active with the agency can also provide a meaningful picture of their satisfaction with their roles as volunteers, and is a critical statistic for program planning, evaluation and development.

Data can also be generated about the number of volunteers who serve in more than one department, project or job, as well as the number of volunteers who regularly agree to fill in during unusual circumstances or in emergencies. Not to be overlooked is the wealth of demographic

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information that can be reported about your volunteers, such as age, sex, race, education, current work status, residence, geographic service location, previous volunteer experience, and their reasons for volunteering. This collective data can provide pertinent information to help you plan and assess your program's breadth in terms of community accountability and involvement.

Perhaps the most tangible way to document the importance of volunteer services to your organization is by reporting the value of their donations of time and talent. By applying a dollar figure to what these unpaid staff do for your agency, you concretely illustrate their importance to the

organization and to the community. As an administrator, you are then able to report that your staff of volunteers has generated a specific dollar amount of services during any one year. After all, most agencies must consider the bottom line in any service provided, whether they be nonprofit or private enterprise. Therefore, it is important that you be able to respond to that issue when advocating for finances and resources for your program.

There is no best way to calculate and present the economic value of volunteers. As in all other aspects of documenting volunteer participation, each program administrator needs to assess what will work best for them and for the agency. The main issues to keep in mind are that any method for equating an economic value to volunteer efforts must be fair, accountable and adjustable.

Now, we all know one or two volunteers who are worth a "million bucks," but that figure is neither fair nor accountable. It is certainly adjustable, however! How you determine a dollar figure per volunteer hour or function can depend on your agency standards for similar paid positions, on standards for paid labor in your community, or on an average number of other factors. For example, an agency that has a volunteer dentist and a host of volunteer nurses, along with a variety of volunteers that provide clerical services, must decide if the dollar value of the services should be separated by job description or averaged together. The choices might be to assign the dentist a volunteer value of \$50 per hour, the nurses a rate of \$15 per hour and the clerical help \$5 per hour, or to calculate all three of the volunteer positions at a simple rate of \$10 per hour.

Summary

The four steps of defining, recording, collecting and reporting volunteer participation are critical to any program, large or small, urban or rural. However, this discussion should only be considered a starting point, since each agency and program which uses volunteers will have different circumstances to be considered. If you are not already doing so, it is time to chart out what you want to "record" and what you want to "report" about your volunteer program. Keeping in mind the important points of practicality, efficiency and ease, you can become better organized, more knowledgeable about your volunteers and better equipped to deal with the long term needs of your program.