



FOR THE RECORD: Effective Volunteer Management Through Documentation

By Peggy A. Sissel, M.A.

When was the last time you were asked "how many volunteers do you have in your program?" It is a simple question to answer, yet it is often the only one that volunteer administrators address. Going beyond this superficial evaluation of the numbers requires some effort; therefore, some administrators of volunteer programs question the use of recording and reporting volunteer hours because "they have more important things to do."

If we evaluate this task in terms of the management function it serves, however, we discover that the information gained far outweighs the time spent in gathering it. Put simply, documentation of volunteer involvement can lead to a greater understanding of your program and of the individuals who serve within it.

Any negative attitudes you may have about record-keeping need to be addressed before you start this process. You may think that the recording of volunteer hours is too time consuming or too confusing. Worst of all, you could discover that your program has a problem. But be posi-

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tive. As we explore the value of recording and reporting volunteer hours, you will see how it can benefit not only your program but everyone involved.

There are four reasons why you need to maintain formal records of volunteer participation in your agency:

- The individual volunteer
- The volunteer program
- The organization
- The community

Let us consider each of these areas and the impact that proper documentation can have on issues of management.

The Individual Volunteer

Encouraging, evaluating and recognizing individual volunteers are a big part of a program administrator's job. Yet, it may not be possible for you to interact with each volunteer during his/her scheduled shift. Therefore, documentation of attendance is a basic, crucial function. Tardiness, absenteeism and early departures can tip you off to a volunteer who needs more attention or assistance, and possibly a new placement.

Remember, too, that the feedback you give volunteers through the evaluation process is extremely valuable. You want to help the volunteer achieve his/her desired goals within your program, so it is important that your criteria for reviewing performance be objective and fair. A volunteer's record of hours is an excellent source of information to draw upon during evaluations, since it reflects a volunteer's level of attendance, punctuality, and any

efforts that have gone beyond expectations.

Many individuals seek to gain skills and experience while volunteering and will ask you to provide a reference for future schooling or employment. The number of hours a volunteer has contributed can be an important indicator of their drive, motivation and commitment. Your written records of participation are the foundation on which to base a fair appraisal long after the volunteer has left your program.

Your records of a volunteer's hours can also be helpful to the individual at tax time. Although the actual hours of service donated are not tax-deductible, many nonreimbursable expenses incurred while a volunteer is on duty are tax-deductible. You may be asked to supply documentation of a volunteer's time and efforts if he/she has chosen to itemize any allowable expenses.

One of the most important reasons for recording volunteer hours is that without a written record of participation, it is difficult to recognize effectively the efforts of volunteers. The number of hours, months or years of service are important markers of an individual's merit to your agency and their level of commitment to their community. This reason alone may be what has prompted past documentation of hours in your program. If so, wonderful, but use it now to your best advantage.

Some participants in your program may require formal record-keeping of their activities. Community restitution and probation departments mandate accurate docu-

mentation of hours, as do schools that place interns and students with your organization. This information should be considered as valuable to you and your program as it is to the individuals placed with you.

The Volunteer Program

Accurate record-keeping can give feedback and encouragement to the individual in a number of ways, but what about its use in managing the volunteer program as a whole?

Program planning, needs assessment and project evaluation are another major responsibility of a volunteer administrator's job. Like the individual volunteer, program directors also need to be encouraged and motivated while doing a job that can be wonderfully satisfying and exceptionally frustrating at the same time. Solid data that reflects the overall health of the program, including its ups and downs, can offer inspiration and motivation. At the very least, information about volunteer participation can alert you to problems or concerns that need to be addressed.

What if you should discover that your program isn't as effective as you had assumed? A successful manager realizes that it is better to document the problem and plan for change and improvement than to ignore the issue and hope it goes away.

Information about the level of volunteer participation can help you set goals for your program. You may discover that you need to explore more effective methods of recruiting volunteers, or address ways of retaining them once they are in your service. You might need to develop more meaningful roles for volunteers to keep them active and interested, or expand the number of hours volunteers are asked to contribute. Your figures may indicate that you need to change your criteria for accepting volunteers, choosing only those who are ready to take their volunteer commitment seriously. Regardless of the outcome of your evaluation, recognizing your program's strengths and weaknesses is a vital part of program development.

Some volunteer administrators are required to justify their salaries and programming expenses through the documentation of volunteer participation. Even if this is not required of you, begin to do so. Regardless of the number of hours a volunteer coordinator works, there is always more that needs to be done. This is especially true if your program is growing. Use this practice of reporting your suc-

cesses (and efforts at improvement) as a means of supporting and promoting your program. This information is also vital when requesting increased staff or expenditures.

Documenting today's volunteer hours will help you compile that end-of-the-month report, justify your budget, plan for growth or change and help you become a more effective manager. In time, it will also enable you to chart the development of your program, which will provide an important record for your program staff, especially if you should move on to another position.

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The Organization

The volunteers you coordinate belong to the entire agency for whom you work, not simply to your program. They are there to help with the specific service or function of your organization. Agency staff often do not see the volunteer program's connection to themselves, however, and thereby dismiss it as something they do not need to concern themselves with. You may have to convince them of the value of volunteers, and you can do so by providing facts about how volunteers contribute to the organization.

Your records of volunteer efforts can

motivate staff to use volunteers and can facilitate good relationships with co-workers other than management. Employees unfamiliar with the benefits of volunteer programs may resent the hiring of a paid volunteer coordinator when, as they may see it, the money could be better spent if another nurse, accountant, counselor, etc. were hired. Positive staff and volunteer relationships are critical to the success of any volunteer program.

Obviously, if a volunteer program is to be successful, ownership and interest of this program needs to be agency-wide. Therefore, you will want to "share the glory" with the staff and let them know how effective their efforts are at managing volunteers. You will also want to provide assistance (or seek assistance as the case may be) if you find that there is a problem in a particular area. Some of these issues can be discovered through analysis of your volunteer records.

For example, you may find that one department has a group of volunteers that consistently puts in additional hours, or that an office that had used four volunteers one month now has none participating. Patterns often emerge from the records that can help you take note of seasonal needs, programming changes or problems with staff and volunteer relations.

By reporting your findings to each department or supervisor, you offer them the same information and insight from which you have benefited. Ultimately, this results in promoting acceptance and understanding of the value of volunteers, which translates into more effective management at the department level. This sharing of information about your volunteer program creates a spirit of team work, camaraderie and respect. In many ways, this is the greatest success.

The knowledge of why volunteers get involved in your agency, how they are managed and the importance of their service to the organization can be used as a positive message to everyone in the agency, as well as to the entire community.

The Community

Positive community and agency relations promote a better understanding of the need for your service and the importance of the issues you address. Whether it be prison reform, education, domestic violence, public health, the environment or historical restoration, an organization that serves the community also needs the community behind it.

One of the best ways to foster this support is by including volunteers in your services. Members of the community who are involved in providing your service will be some of your most vocal allies and some of your best proof that the agency is both responsive and effective.

As a program administrator, your leadership is also important whether you are concerned with the recruiting end of the volunteer continuum or the recognition side of this community involvement. It is your responsibility to provide feedback about the ways volunteers have helped your agency. Remember, that if it is of value to document the number of people your agency serves each year, isn't it also important to be able to say how many people served your agency?

When you recognize a great volunteer by publicly thanking him or her, you also



pat the organization on its proverbial back by saying, "Look, here is a critical issue being dealt with by an important agency, which is being helped by this valuable person." And who is this person but a volunteer who gets no pay and who contributes time simply because he/she thinks it is a good thing to do. In fact, there are many more people just like this person who believe in what you want to accomplish. So shout it from the rooftops, but be ready to prove it through documentation.

The importance of maintaining careful records of community participation cannot be underscored enough, for without these records the individual, the program and the organization could not be held accountable or be promoted adequately.

Of course, volunteer recognition helps the agency and the volunteer program, and it makes the volunteer feel good, but it also helps the community. How? By creating awareness of a problem or issue and the ways to solve it, by presenting opportunities to get involved for the civic good, and by promoting positive leadership.

Another way to envision the vital nature of record-keeping as a management tool is to think of every hour of volunteer time as a "little letter of support." In any proposal for funding, letters of support from community leaders, service providers and civic groups provide a show of support for the agency and its concerns. These letters advocate that the funding source contribute to this worthwhile effort. Every volunteer hour that you report as having been contributed to the agency increases the perceived level of community support.

A positive image in the community can go a long way towards acquiring and maintaining funding levels which will allow you to continue providing services. This is true whether your funding is service generated or comes from taxpayers and private foundations.

Regardless of the type of service your agency provides, you want it to be meaningful, helpful and effective to those you serve. If you believe your organization contributes to the good of the community, then you want it to be the best that it can be. That means implementing sound, responsible management practices that benefit everyone in the agency and outside of it.

These are cynical times we live in, so more than ever we need to inspire, motivate and perpetuate the good in all of us and in our community. The documentation of volunteer contributions can be the good news that inspires the best in all of us.



A CHECKLIST FOR DOCUMENTING VOLUNTEER PARTICIPATION

- Do you currently keep records of volunteers' hours?
- Do you keep up-to-date documentation of these hours on each volunteer?
- Do you use a record of hours contributed as a resource for evaluation of volunteers?
- Do you record volunteer hours for each department or project in which volunteers are placed?
- Do you issue regular reports to agency administration and department supervisors about volunteer involvement?
- Do you use this information to evaluate management practices of each program or department?
- Do you use this information to evaluate the strengths and weaknesses of the volunteer program as a whole?
- Does your agency include reports on volunteer contributions in funding requests and grant proposals?