



The Clyde J. Tracanna  
*Volunteer* \_\_\_\_\_  
Resource Center of Washington County

GUIDELINES, POLICIES AND PROCEDURES

APPROVED:

Volunteer Resource Center Committee 10/26/88

United Way Executive Committee \_\_\_\_\_

United Way Board of Directors \_\_\_\_\_

CLYDE J. TRACANNA  
VOLUNTEER RESOURCE CENTER  
OF WASHINGTON COUNTY

GUIDELINES, POLICIES AND PROCEDURES

I. STRUCTURE

A. Bylaws and Policies

1. **Mission:** To increase the capacity of nonprofit human service organizations in Washington County to respond to County residents in need of help by developing, implementing and maintaining a program to recruit, train and involve greater numbers of volunteers in community service.
2. **Name:** The program will be known as the Clyde J. Tracanna Volunteer Resource Center of Washington County (VRC). The intent is to honor a respected volunteer and challenge volunteers to serve with the same standards of dedication and selflessness as Clyde J. Tracanna.
3. **Principal Office:** The post office address of the principal office of the VRC is The United Way Building, 58 East Cherry Avenue, Washington, Pennsylvania 15301.
4. **Parent Organization:** The Tracanna Volunteer Resource Center is a United Way of Washington County community service program intended to benefit all non-profit organizations that need and use volunteers in Washington County. The bylaws of the VRC shall be those of the parent organization. Legal requirements for the VRC shall be met and maintained through the parent organization. The business and property of the program shall be vested in the parent organization.
5. **Guidelines and Policies:** This document shall contain all written policies and guidelines for the VRC, subject to such amendments made by the Advisory Board and approved by the United Way Board of Directors.
7. **Financial Management:** Budget and financial management of the VRC shall be in accordance with accepted practices for non-profit organizations.

TRACANNA VOLUNTEER RESOURCE CENTER  
GUIDELINES, POLICIES AND PROCEDURES  
Page 2

B. Organization

1. **Advisory Board:** The VRC shall be governed by an Advisory Board actively and effectively involved in, and responsible for, the planning, supporting and evaluating of all activities of the Tracanna Volunteer Resource Center. The Board shall consist of not more than thirty (30) members who shall be appointed and elected as follows:
  - a. Board members shall be representative of the community, in terms of sex, race, ethnicity, age and economics.
  - b. **Parent Representation:** Fifteen (15) directors shall be appointed by the President of the parent organization from the parent Board of Directors for terms of two years. This group shall also serve as the Volunteer Resource Center standing committee of the parent organization. The chairman of the standing committee shall also serve as chairman of the Advisory Board.
  - c. **Community Representation:** Fifteen (15) directors, not currently serving on the parent Board, shall be appointed by the chairman of the Advisory Board for two years to achieve and maintain broad-based community representation.
  - d. **Terms of Service:** One-half of the appointments to the first Advisory Board shall be for terms of one year and one-half of the appointments shall be for terms of two years. No director may serve more than two consecutive two year terms.
  - e. **Vacancies:** Vacancies occurring on the Board may be filled by the Chairman or parent President in accordance with b. and c. above for the remainder of the unexpired term.
  - f. **Meetings:** Regular meetings of the Advisory Board shall be held at least quarterly. Special meetings may be

TRACANNA VOLUNTEER RESOURCE CENTER  
GUIDELINES, POLICIES AND PROCEDURES

Page 3

called by the Chairman. Members shall be given notice of all meetings at least seven days in advance.

- g. Duties: The Advisory Board has freedom, authority and autonomy to work directly with the community and to act as delineated in these written guidelines subject to ultimate review and approval of the parent organization. Specific duties shall be:
- o To serve as a policy-making body, separate from the parent board, with delegated authority to set direction for the Volunteer Resource Center under guidelines established by the parent.
  - o To appoint such committees as it deems expedient for carrying out the objectives of the VRC, and to act on the recommendations of such committees.
  - o To set goals and objectives annually, and to evaluate the extent to which such goals and objectives are met.
  - o To recommend for parent board approval a separate budget, including fundraising activities with authority for the Volunteer Center to make expenditures.
  - o To maintain a separate identity for the Volunteer Resource Center within the parent organization, as a separate department of the organization.
  - o To recommend that the parent organization employ adequate paid and/or volunteer staff for the successful attainment of VRC objectives.
  - o To give, at least once a year, a full and complete financial report and accounting of its activities to the parent board.

TRACANNA VOLUNTEER RESOURCE CENTER  
GUIDELINES, POLICIES AND PROCEDURES  
Page 4

- h. Committees: At its first regular meeting the Advisory Board Chairman shall appoint subject to the approval of the Advisory Board, the chairmen and members of the following committees:
  - o Executive Committee: This committee shall consist of not more than ten members and include the Advisory Board chairman and other committee chairmen.
  - o Program Committee: This committee shall consist of not more than ten members and be responsible for maintaining and updating the program of the Volunteer Resource Center as described elsewhere in this document.
  - o Resource Committee: This committee shall consist of not more than ten members and be responsible for developing and maintaining adequate resources for the Center as described elsewhere in this document.
  - o Public Relations Committee: This committee shall consist of not more than ten members and be responsible for publicizing the activities of the Center to help achieve VRC objectives as described elsewhere in this document.
  - o The Chairman may appoint such other committees as may be required from time to time.
- i. Orientation: Each new board member will be provided with a manual which shall include a copy of the VRC guidelines, policies and procedures.
- j. It shall be the responsibility of Advisory Board members to assure that they are provided with the requisite information and resources to enable effective decision making and operational evaluation.

TRACANNA VOLUNTEER RESOURCE CENTER  
GUIDELINES, POLICIES AND PROCEDURES  
Page 5

B. Organization (continued)

2. **Staff Management:** The VRC shall employ well-qualified staff in sufficient numbers to ensure adequate operation and accomplish the mission. VRC staff employment shall be in keeping with the affirmative action policy of the parent organization.
  - a. Staff shall have a clear understanding of their duties and responsibilities through written job descriptions. Staff will be provided with adequate training, tools and support to perform tasks.
  - b. Parent organization personnel policies shall be applicable and govern VRC staff.
  - c. The annual budget shall present salaries, benefits and expense allowances required and commensurate with the work to be done and comparable agency positions.
  - e. **Paid Staff:**
    - o A VRC Director shall be employed with responsibility for VRC administration.
      - .. The Director shall be a professional with the skills necessary to execute the responsibilities, and duties presented in the job description.
      - .. Initial VRC management will be by existing parent organization staff.
    - o Support staff shall be employed as approved by the Advisory Board.
      - .. Initial support will be provided by existing clerical staff of the parent organization.
  - f. **Volunteer Staff:**
    - o Volunteers shall be used to enhance VRC operations.
    - o Volunteer job descriptions shall be approved by the executive committee.

## II. PROGRAM

### A. Description

The Volunteer Resource Center acts as a broker between potential volunteers and agencies utilizing volunteers. Responsibilities of the VRC include: counseling callers regarding their skills and interests, making placement suggestions, tracking referrals, assisting agencies to find new ways to utilize volunteers, training volunteers and volunteer coordinators, and promoting volunteering.

### B. Goals

The VRC has four major goals in Washington County.

1. To increase the number of people volunteering.
2. To increase the number of community agencies using volunteers.
3. To achieve more effective use of volunteers through training and information exchange.
4. To heighten the awareness of the importance and desirability of volunteering.

### C. Developing Effective Agency Relationships

The VRC can only be as strong as the agencies who need volunteers. If agencies do not effectively utilize referred volunteers, people will assume that needs are not great. This causes a lack of credibility for the VRC and the agencies needing services. To prevent this situation from developing, the VRC must have a strong working relationship with the agencies.

1. **Site Visits:** The VRC staff should make personal calls on agencies to develop a rapport and to see and learn about agencies operations.
2. **Orientation:** The VRC staff should schedule orientation sessions for the agencies on the VRC. These sessions should be offered regularly throughout the year and at various locations to ensure that all interested agencies can attend. The orientation should cover:

TRACANNA VOLUNTEER RESOURCE CENTER  
GUIDELINES, POLICIES AND PROCEDURES  
Page 7

- a. An overview of the VRC program.
    - o Roles of VRC, agencies, volunteers.
    - o Community-wide nature of VRC and its commitment to volunteers.
  - b. Developing effective volunteer jobs, group volunteering, creative volunteer uses to meet community needs
  - c. Agency feedback - needs and problems.
3. Job Design Assistance: The VRC should work closely with agencies to help develop, maintain and strengthen volunteer programs.
- a. VRC can help build agency skills in job design, creative volunteer use and program building.
  - b. A result should be job descriptions useful in the VRC referral process.
  - c. Each agency should be instructed on using the VRC job description form (attached).
4. Letter of Agreement: A written agreement between the VRC and each agency should be executed to clarify the roles of each party.
- a. Emphasize the importance of job descriptions, good volunteer management and the need for follow-up on the part of agencies.
  - b. Explain the VRC referral process.
5. Ongoing Training and Management Assistance: The VRC will offer, conduct and coordinate training programs for volunteers, volunteer coordinators, boards, as well as organize conferences and special consultations.
6. Communications Bulletins: The VRC will regularly communicate with agencies to maintain their interest and support. This will include a newsletter, information memos, or even photocopied articles of interest.



TRACANNA VOLUNTEER RESOURCE CENTER  
GUIDELINES, POLICIES AND PROCEDURES

Page 8

7. **Agency Recognition:** The VRC will develop creative methods to recognize and reward agencies that work with the VRC and manage their volunteers well.
  - a. Feature articles in VRC newsletter.
  - b. Acknowledgement at annual volunteer recognition event.
  - c. Commendation letters recognizing excellent volunteer administrators.

D. Recruitment and Referral of Volunteers

The VRC will recruit and refer volunteers from all segments of the community and serve as the central information/exchange point for local volunteer involvement.

1. Recruitment shall be a coordinated effort to attract volunteers by increasing public awareness of the need for volunteers and the kinds of opportunities that are available.
  - a. Recruitment efforts shall be sensitive to the following reasons people volunteer:
    - o Help with community problems.
    - o Use skills in a different setting.
    - o Use different skills.
    - o Explore a new career.
    - o Meet people.
    - o Get away from traditional paid job.
  - b. The VRC will work closely with local corporations and businesses to encourage the involvement of their employees in community volunteer activities.
  - c. The VRC will work regularly with organized labor and local unions to encourage the involvement of their members as community volunteers.

TRACANNA VOLUNTEER RESOURCE CENTER  
GUIDELINES, POLICIES AND PROCEDURES  
Page 9

- d. Recruitment shall also target special groups and interests which are potential sources for volunteers such as service clubs, educational organizations, rural, ethnic, and religious groups, programs for the elderly, young people, unemployed and the handicapped.
  - e. The VRC shall promote the concept of volunteerism through community-wide public relations efforts and close contact with local media.
    - o The VRC will maintain a Directory of Volunteer Opportunities for the community and work closely with local newspapers and broadcast media to regularly communicate this information.
    - o Speakers shall present the VRC program to community organizations that are sources of potential volunteers.
    - o Communications should focus on the need for volunteers, roles of VRC, agencies, and volunteers, show the community-wide nature of the VRC and its commitment to volunteers, and the benefits to all.
    - o Other communications-based recruitment efforts include: mall programs and displays, volunteer fairs, a VRC newsletter, flyers, brochures, posters, radio and TV announcements, newspaper features on volunteerism, paycheck and bill stuffers, VRC materials in "welcome wagon" kits, new employee and/or retiree orientation packets.
2. Interviews shall be conducted to determine the desires, skills, capabilities and availability of potential volunteers.
- a. VRC staff and/or trained volunteer shall conduct all interviews.
  - b. Interviews may be conducted in person or over the telephone.

TRACANNA VOLUNTEER RESOURCE CENTER  
GUIDELINES, POLICIES AND PROCEDURES  
Page 10

- c. The interview is the source of initial statistical information about the potential volunteer.
  - d. Interviews are a positive process to explain the VRC operation and collect essential information. Nothing should occur to discourage or deter volunteer involvement.
    - o Give an overview of the VRC highlighting its function, mission, personnel, programs and structure.
    - o Explain the need for the information being collected.
    - o Discuss the importance of volunteering and how it fits into the role of the VRC and agencies.
    - o The standard VRC Volunteer interview form should be the sole source of questions used to collect needed information (sample form attached).
3. Skills Bank: The VRC shall develop and maintain a computerized skills bank/data base to manage volunteer information and referrals.
- a. General Interest Bank: People who indicate an interest and willingness to "help" and evidence no special skills or interests.
  - b. Board Bank: People interested and with appropriate skills and experience for service on nonprofit boards of directors.
  - c. Special Skills Bank: People interested in using their professional skills (physicians, attorneys, accountants, etc) or trade skills (carpenters, plumbers, electricians, etc).
4. Record Keeping: The VRC shall maintain up-to-date records with safeguards for confidentiality.

TRACANNA VOLUNTEER RESOURCE CENTER  
GUIDELINES, POLICIES AND PROCEDURES

Page 11

- a. Records concerning volunteers, referrals, service and training of volunteers.
  - b. Records concerning current and historical job opportunities and community needs.
  - c. Records on agency volunteer programs and their support services to volunteers.
5. Referrals: Volunteers shall be referred to those volunteer jobs which will best meet the needs of the volunteers, receivers of service and the agency in compliance with affirmative action policy.
- a. Current volunteer job opportunities appropriate to the potential volunteer's skills and interests are reviewed and discussed.
  - b. Referrals are made immediately whenever possible volunteer job needs on file.
  - c. The ultimate decision to "hire" a potential volunteer is made by the agency in need.
6. Follow-up Contact will be conducted regularly and efficiently with volunteers and agency staff to find out whether all parties are satisfied with the placement.
- a. The follow-up interview is used to:
    - o Assess the recruitment and referral process.
    - o Gather service and satisfaction data.
    - o Produce reports.
  - b. Information will be collected and entered in the volunteer's file including: hours of service, problems/concerns of the volunteer and/or the agency and alerting VRC staff to the need for additional follow-up or trouble shooting.
  - c. Information will also be collected and entered in the agency file.

E. Evaluation of Program

There shall be a regular evaluation of the VRC to insure efficient and effective operation.

1. Volunteer programs: a periodic evaluation of agency volunteer program performance in relation to stated goals and objectives.
2. Volunteer Skill Assessment: Volunteer performance shall be evaluated on a regular basis to determine the volunteer's potential, needs, growth and satisfaction, and contributions to the agency and clients.

F. Training

The VRC shall provide a variety of training and assistance programs for volunteers and agencies.

1. General course in volunteering to prepare volunteers to carry out their service roles in accordance agreed upon standards of performance, agency policies and guidelines that will lead to continued involvement of the volunteer.
2. Board training for volunteer leaders.
3. Work with volunteer administrators to custom develop special volunteer training programs to meet specific needs.
4. Sponsor a council of veteran volunteer leaders to consult with agencies to develop and enhance volunteer programs.

G. Recognition

The VRC will promote regular community-wide recognition programs for volunteer service and creative use of volunteers.

1. Conduct a yearly volunteer recognition event.
2. Sponsor a volunteer of the year award.
3. The VRC will work with agencies and local businesses to develop their own awards and recognition programs.

II. RESOURCE DEVELOPMENT

- A. The VRC shall conduct an active effort to generate financial and other resources sufficient to carry out the envisioned role of the VRC in the community.
1. The Resource Committee each year shall submit through the Advisory Board to the parent organization a plan for resource development.
    - a. The goal of the plan will be to achieve self-sufficiency, independent of parent organization funding.
    - b. The plan will identify needs and recommend to the Advisory Committee an annual budget for accomplishing the goals of the VRC. (sample attached)
    - b. The plan will target broad-based community financial support as well as fees for service.
      - o Volunteer user and training fees.
      - o Corporate volunteer program fees.
      - o Foundation and government grants.
      - o Service club donations.
      - o Public support donations.
    - c. All fundraising activities will adhere to the parent organization's guidelines.
    - d. The plan will also identify, develop and use of non-cash goods and services.
    - e. A listing of potential fund development activities is included as an attachment.
    - f. The plan will consider that fundraising is the primary role of Advisory Board volunteers and the Resource Committee so that the Volunteer Center Director is free to manage the delivery of services.
    - g. The plan will emphasize the marketability of the VRC program.

B. Facilities, Equipment and Supplies

1. The VRC will be housed in quarters which are adequate, accessible and efficient. Space will initially be provided in kind by the parent organization.
2. Equipment required includes:
  - a. Telephones and answering machine.
  - b. Typewriter
  - c. Computer and printer.
  - d. Desks, chairs, file and storage cabinets.
3. Consideration shall also be given to needs and expenses relating to marketing and promoting the VRC program such as:
  - a. Stationary, paper and supplies.
  - b. Printing requirements
  - c. Signs.
  - d. Meetings.
  - e. Postage.

C. Paid Staff

1. The budget shall present salaries, benefits and expense allowances commensurate with the work to be done and comparable positions in similar community agencies.

D. Use of Volunteers

1. Volunteers shall be creatively involved to augment paid and unpaid staff and to expand the VRC program.
2. The same standards and procedures shall apply to volunteers as to the VRC staff.

III. COMMUNITY AWARENESS AND SUPPORT

- A. The VRC shall implement a plan to educate and inform the community about volunteerism and the VRC, keeping the public aware of the services it provides as well as the services provided by other agencies using Center volunteers.

TRACANNA VOLUNTEER RESOURCE CENTER  
GUIDELINES, POLICIES AND PROCEDURES  
PAGE 15

- B. The Public Relations Committee each year shall submit to the Advisory Board a plan for community awareness.
1. The goal of the plan will be to promote the VRC in terms of the services it can provide.
  2. The plan will target its communications to a broad-based community constituency including:
    - a. All geographic areas.
    - b. Different interest groups (churches, business, civic clubs, students, etc).
  3. The plan shall include public information and appeals tailored to special interest groups.
  4. The plan will include use of a variety of tools for public awareness.
    - a. Media coverage.
    - b. Speakers bureau.
    - c. Client endorsements.
    - d. Newsletters.
    - e. Volunteer fair at shopping mall.
    - f. Volunteer recognition events.
    - g. Inspirational speakers on volunteerism.
    - h. Advertisements.





The Clyde J. Tracanna  
*Volunteer*

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Resource Center of Washington County

DEVELOPING VOLUNTEER JOB DESCRIPTIONS

Process:

All jobs need the following three elements built into them. To ensure successful matches of volunteers to jobs, it is critical that these elements are clearly defined:

- o Responsibility - actual task(s) to be accomplished.
- o Authority - the freedom to get the information needed, to get to the right people and to think for one's self.
- o Accountability - the expectations, timelines and parameters of the job.
- o Time - Research indicates that the average amount of time spent per week by volunteers is 3.5 hours. It is recommended that larger jobs or tasks be broken down into smaller units using more volunteers.

Elements of a Good Job Description:

A good volunteer job description should never exceed one page. It should be free of abbreviations, jargon, and acronyms. Anyone should be able to understand what is required. The following must also be included:

- o Title - should be meaningful and reflect the actual work to be done.
- o Goal - a clear, brief statement as to why the job exists.
- o Duties - a concise listing to responsibilities.
- o Qualifications - any specific knowledge, skills, or abilities necessary to be successful in this volunteer job opportunity.
- o Time Commitment - number of hours per day, week, or month. The day(s) and time(s) needed. The duration of commitment needed for this job.
- o Training and other benefits - indicate training required and/or offered and when. Also, indicate any benefits (reimbursements, meals, insurance, etc).

A sample form, "Volunteer Job Profile," is attached.



The Clyde J. Tracanna  
**Volunteer**

Resource Center of Washington County

**CONFIDENTIAL**

**PERSONAL INFORMATION**

Name  Mr.  Mrs.  Ms.  
 Miss  Dr.  Other \_\_\_\_\_  
First Middle Last

Home Address \_\_\_\_\_  
Number Street  
City State Zip Code Home Phone: \_\_\_\_\_

Name of Spouse  Mr.  Mrs.  Ms.  
 Miss  Dr.  Other \_\_\_\_\_  
First Middle Last

**BUSINESS/PROFESSIONAL INFORMATION**

Occupation: \_\_\_\_\_  
If You Are Retired Please List Your Previous Employer: \_\_\_\_\_  
Mailing Address For UW Correspondence  
Check only one:  
 Home  Business

Place of Employment: \_\_\_\_\_

Position/Title \_\_\_\_\_ Division/Dept. \_\_\_\_\_  
If Applicable

Business Address: \_\_\_\_\_  
Number Street  
City State Zip Code Business Phone: \_\_\_\_\_  
Ext.

Business Firms For Which You Are A Director/Officer:  
Firm Position Secretary's Name Firm Position  
1. \_\_\_\_\_ 3. \_\_\_\_\_  
2. \_\_\_\_\_ 4. \_\_\_\_\_

Educational Background: High School \_\_\_\_\_ / \_\_\_\_\_ Year  
College \_\_\_\_\_ / \_\_\_\_\_ Degree/Year  
Graduate/Professional School \_\_\_\_\_ / \_\_\_\_\_ Degree/Year

- Areas of Expertise: (Please check all that apply)
- |   |  |   |
|---|--|---|
| <input type="checkbox"/> Accounting                   | <input type="checkbox"/> Education     | <input type="checkbox"/> Organizational Development   |
| <input type="checkbox"/> Advertising                  | <input type="checkbox"/> Government    | <input type="checkbox"/> Organized Labor              |
| <input type="checkbox"/> Banking & Finance            | <input type="checkbox"/> Homemaker     | <input type="checkbox"/> Research                     |
| <input type="checkbox"/> Commercial Sales/Services    | <input type="checkbox"/> Law           | <input type="checkbox"/> Social Services              |
| <input type="checkbox"/> Communications               | <input type="checkbox"/> Management    | <input type="checkbox"/> Technology                   |
| <input type="checkbox"/> Community Services           | <input type="checkbox"/> Manufacturing | <input type="checkbox"/> Utilities                    |
| <input type="checkbox"/> Computer/Information Systems | <input type="checkbox"/> Marketing     | <input type="checkbox"/> Other, please specify: _____ |
| <input type="checkbox"/> Economics                    | <input type="checkbox"/> Medical       |   |



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Resource Center of Washington County

VOLUNTEER JOB PROFILE  
(one job per form)

Agency: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_ Zip \_\_\_\_\_

Contact: \_\_\_\_\_ Phone: \_\_\_\_\_

Date Requested: \_\_\_\_\_ # Volunteers Needed \_\_\_\_\_

Title: \_\_\_\_\_

Goal: \_\_\_\_\_

Duties: 1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

Time Commitment (circle and/or specify):

Duration: On-going / Short-term / \_\_\_\_\_

Days: Weekdays / Saturday / Sunday / \_\_\_\_\_

Hours: \_\_\_\_\_

Requirements/Skills Needed: \_\_\_\_\_

Training and/or Benefits: \_\_\_\_\_

VOLUNTEER RESOURCE CENTER

BUDGET

PERSONNEL COSTS

Volunteer Resource Center Director, Full Time	in-kind
Clerical Support, Part Time	
Employee Taxes and Benefits	
Sub-Total Personnel	

PROJECT COSTS

Materials	\$ 2,500
Program Events	1,000
Recognition Costs	<u>2,500</u>
Sub-Total Project	\$ 6,000

ADMINISTRATIVE COSTS

Space	\$ 2,000
Telephone	615
Local Travel	1,000
Postage	400
Printing and Promotions	2,000
Office Supplies	100
Meeting Expenses	500
Administrative Overhead	<u>2,000</u>
Sub-Total Administrative	\$ 8,615

<u>TOTAL BUDGET</u>	<u>\$14,615</u>
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