

# The One Minute Answer to Volunteer Management Questions



*A Practical Approach*

By Mary Kay Hood

Jesus -  
my mentor,  
my guru,  
my hero -  
Mary Kay

# The One Minute Answer to Volunteer Management Questions

*A Practical Approach*

By Mary Kay Hood

Dedicated to:  
Shelley Mitchell

**The One Minute Answer to Volunteer Management Questions: A Practical Approach for the Beginner.** Copyright © 2002 by Mary Kay Hood. All rights reserved. Printed in the United States of America. No part of this book may be used or reproduced in any manner whatsoever without written permission of the author.

Publisher:

Blue Water Publishing  
366 West 200 South  
Danville, Indiana 46122

Editor:

Pamela O'Bryan

Cover Design:

Robyn Eley

ISBN Number:

# Contents

Preface

1. Community Involvement	1
2. Understanding Motivation for Volunteers	4
3. Recruitment	8
4. Interviewing – Getting to “No”	23
5. Supervision	38
6. Recognition	47
7. Forms, Forms, Forms	52
8. Risk Management	67
9. The Value of Networking	72
10. Leadership	75
Appendix	82
Bibliography	87

# Preface

I've been in the business of volunteer program management for thirteen years now.

During that time, I have tried to stay current on what's happening in the field of volunteer management. Because there seems to be high turnover in this field, I have also been called upon to do some teaching through the United Way of Central Indiana. Later, I got brave and submitted proposals to present at the Association of Volunteer Administration international conferences. During all this time, lots of participants in workshops and local Directors Of Volunteers In Agencies (DOVIA's) kept telling me I should write. I never figured myself for much of a writer, so one day I challenged one of them by telling them I didn't know anything about writing. And they told me to write it as if I were presenting it. And once the roadblock was cleared, it became easy to sit down and put on paper what I would normally be saying if I were teaching this material.

There's lots of material written about volunteer management and there are lots of components to having a good program. Sometimes, beginners are so overwhelmed because they are up to their knees in alligators when they are supposed to be draining the swamp. I hope this book offers a fresh perspective for the beginner. Concentrate on the things that you can have an impact on and make sure that you take the time up front to put the process in place. It will make your entire career in this business easier.

# Chapter One

## Community Involvement

No thorough discussion of volunteerism can begin until some thought and consideration is given to what constitutes community involvement. So what exactly does *community involvement* mean? For me, community involvement means someone has a willingness to play an active role in the community. A *desire* to play an active role in the community also needs to be a part of the concept. Community involvement covers a broad spectrum of opportunities, assignments and agencies both at the local, national and international level. It can be personal or professional. However, it is a means of taking action collectively to accomplish a particular goal for the community. There are various types of community involvement from participating as a member of a civic or religious organization to participating in city/town/county meetings. Some go one step further and take action as a public office holder. And then there is participation at the grass roots level. So, how does this fit into the picture of volunteerism?

I bet if you asked a roomful of people how many volunteer, there would only be a small number of hands that go up. However, if you asked who has ever helped at their church or with little league or youth soccer or helped a neighbor get to a doctor's appointment or took care of a neighbor's child during a crisis or illness, most every hand in the room would be raised. Yet, those people do not consider themselves volunteers. But, aren't the things identified here all part of community involvement – taking action collectively to accomplish a particular goal for a community? So why do people continue to see volunteering as different from community involvement? Now, I consider the things mentioned above to be part of the informal grass roots efforts of volunteering or community involvement.

The other side to this includes the formal grass roots efforts – organizations for education, culture, social services, and disaster relief. These agencies recognize that there is such a thing as volunteerism and they have the mechanisms and processes in place to handle, recruit, train, organize, and supervise volunteers.

The Independent Sector, a coalition of leading non-profits, foundations, and corporations strengthening not-for-profit initiatives, philanthropy, and community action, keeps its finger on the pulse of the world of philanthropy and volunteering. It conducts bi-annual surveys on household giving and volunteering. In recent years, the survey results tell us that although a larger percentage of people are volunteering in the United States, those people are giving less time. This illustrates that time is one of the most prized resources in today's world. Although technological advances have made it easier to do things, the



fact remains that people are busier than they've ever been. This lack of time is sometimes called "time poverty," a phrase coined by Mary Merrill (Merrill, 2001). The survey process also captures data on the type of volunteer work performed most frequently as well as distribution of volunteers and types of assignments. It would be useful to understand this data as it relates to your agency and your role as the volunteer program manager within your agency.

You will also find if you check out the current data, that informal community involvement ranks as the highest percentage of volunteer assignments. This not only illustrates the entire concept of community involvement but also confirms that people do not necessarily think of the informal community involvement as volunteerism.

The motivating factor behind why someone gets involved in their community can be from a political perspective, or perhaps a professional perspective, maybe a family perspective, community perspective, or a spiritual perspective. Whatever factor is driving the volunteer to be involved in the community, it will provide enrichment, exposure, and a certain empowerment that they are making a difference and making the community a better place for each and every one of us as well as the future generations to come.



## Chapter Two

# Understanding Motivation for Volunteers

So, why do people volunteer? The list is very long and unique to each individual.

However, there has been much research into the theories of motivation. Most notably, the research done by Dr. Abraham Maslow (Maslow, 1970) and Dr. David McClelland (McClelland, 1985) reveals the recurring themes that surface when discussing motivation behind volunteer efforts.

Dr. Abraham Maslow's Hierarchy of Needs identifies the following:

- Physiological – the *basic needs*, which translates to mean food or meals, temperature control, adequate space, and a place to work for the volunteer.
- Safety – *free from harm*, which translates to adequate parking space, a secure building, and safety for the volunteer.
- Socialization – the process of *relationships*, which translates to the volunteer having direct work with people or clients.
- Esteem – *acclaim*, which translates to recognition, promotion, and responsibility for the volunteer.

- Self-actualization – *reaching true potential*, which translates to innovation, creativity, and direction on behalf of the volunteer.

Maslow's insight tells us:

- An unmet need motivates; a met one does not. For example, if you're hungry, food is the most important motivation for you.
- People are motivated by their lowest level of unmet need. When you're starving, who cares about self-actualization – just find something to eat.

Dr. David McClelland's theory identifies three basic motivators (McClelland, 1985) in most people:

1. Achievement
2. Affiliation
3. Power/Influence

**Achievement** motivated people need to have specific goals in mind. They generally work well alone and stick to the tasks at hand until the work is completed. They like to problem solve but they need feedback and tangible rewards as they progress. They are especially good at:

- Assessments
- Fundraising
- Gathering statistics
- Keeping records or score
- Leading events
- Setting records
- Skill-building tasks

**Affiliation** motivated people like the personal interaction side of volunteering. They work to make friends in their volunteer activity. They enjoy group projects and want to keep everyone happy. They are there for the socialization aspect of volunteering. They are especially good at:

- Case-work
- Committee work
- Group projects
- Recruiting others
- Task force work
- Welcoming new people
- Working with clients

**Power/Influence** motivated people need to know they are making a difference. They enjoy teaching others and generally seek a position of authority or responsibility. They can be very persuasive and can work well alone or with others. They are especially good at:

- Board or leadership positions
- Challenges
- Creating new ideas
- Influencing others
- Innovation
- Solving disputes
- Teaching
- Writing articles

Motivation is both an art and a science. Theories give volunteer program managers an understanding of how people respond, what needs and expectations people have, and how

people are attracted by personal likes. The art of motivation comes from having clearly defined work and duties available for volunteers and then matching volunteers to appropriate work within your agency. Then and only then can the volunteer program be successful for your agency.

This discussion is by no means complete but does offer some basic understanding into the recurring themes involved with volunteer motivation. This will be important for designing meaningful positions for volunteers, as well as for recruitment, interviewing, placement, retention, and recognition.

The following chapters will deal with issues pertinent to managing a solid volunteer program, and they are presented in the order in which you will normally encounter them. With that said, let's start with recruitment.

# Chapter Three

## Recruitment

Agency executives will tell volunteer program managers to recruit, recruit, and recruit.

They give no thought to what you want volunteers to do for your agency. I would encourage you to tell them, “Stop. Wait. Recruitment is the *third* step.” Let me give you some background information as I explain.

When you think of recruitment, think about who volunteers and think about these people you might know.

- College students
- Disabled
- Employed men and women
- Families
- Former clients
- Groups (Scouts, Lions Club, 4-H)
- High school students
- People in transition in life phases
- People of diverse ethnic and cultural groups
- People new to an area

- People with hobbies
- Professional volunteers (pro bono)
- Retired and pre-retired
- Singles
- Unemployed potentially seeking employment or training skills
- And the list can go on and on and on

Then, think over this list and give some thought as to why these people might volunteer.

- Act on spiritual values
- Be with people who share the same values as they do
- Bring more balance into their life
- Develop new skills
- Earn credit for school
- Feel useful and needed
- Gain experience for a new career
- Gain leadership skills
- Give something back to the community
- Make a difference
- Meet new people
- Strengthen a resume
- To be challenged
- To socialize
- To support a cause
- Use skills not utilized in their job
- And the list can go on and on and on

No matter the whom or the why, recruitment has to be the third step. So what are the first two steps?

As Susan Ellis would say, first and foremost, your agency needs to understand why they want volunteers in the first place (Ellis, 1996). Is it because volunteers can bring a wealth and breadth of knowledge and expertise the agency cannot afford? This would be the ideal. Or is it driven by budgetary constraints? This situation is less than ideal but still workable. Maybe it's pure and simple – because they've always been there. This situation is not bad, but could be cause for trouble, especially if the long-term volunteers take too much *ownership* of the agency.

The past trends of volunteers told us that people valued education; learning outside the classroom and redefining education with practical on-the-job training and coaching. Because people were living longer, they desired to work with others who valued the same things as they did. There was also a shift into ecological interests.

However, today's trends tell us:

- More people are volunteering than ever before.
- The “typical” volunteer has changed.
- Volunteers are more focused on what they want to do.
- There are more organizations to choose from for interested volunteers.
- Seniors take “time off” to vacation or winter in warmer climates.
- New technology broadens the opportunities for utilizing volunteers.
- There is an increase in the short-term volunteers.
- More people are choosing “one-time” volunteer efforts.
- There are more service learning educational requirements.
- People are utilizing volunteering to support their career.
- Today's volunteers want more say in the organization they support.



Once your agency has determined why they want volunteers and there is a clear understanding of this background, the next step and often the hardest is to design meaningful position descriptions for your agency. A position description is an outline of tasks/duties, requirements, and other relevant information. Minimally, it should include title, qualifications, duties, supervisor, as well as requirements to complete the tasks assigned. Designing valuable position descriptions is the most likely stumbling block to creating meaningful opportunities for volunteers. Sometimes, the staff people are afraid of losing too much of what they like to do. Maybe they are concerned that someone will come along and do it better than they. Whatever the case, here are a couple of examples of methods to create meaningful position descriptions for your agency.

This exercise originated by Ivan Scheier (Scheier, 1988) should be done in conjunction with department staff.

1. Have each one of them write down the three or four things that they really enjoy about their job; the really fun stuff for them.
2. Next, have them write down the three or four things that they are required to do in the job but they really don't like to do.
3. Finally, have them write down the things they would like to get more done of in their job, but there just isn't the time available to permit it.

Take a look at what's on list 2 and 3 and see if there isn't something that can be put together to create a meaningful position description. You want to try to stay away from adding anything from the first list so that you can ensure that the staff will completely support volunteers working with them. What one person may not enjoy may easily be

done by someone else who enjoys those tasks. If you sit down with each department, its staff will also feel as though they had some say in the process and will be more likely to embrace volunteers as they are placed in their area.

Another trick that I have found creates credibility and value for the volunteer program manager is to actually complete a shift once a year in each area that uses volunteers.

Now, this may sound silly and you may be thinking, But I already know how to do clerical work. However, committing yourself and your time to this concept gives you three advantages that you can get no other way.

1. You will be showing the agency staff that you are serious about the volunteer program and that you are committed to the program being successful – so much so, that you are willing to do the work yourself. Now, in some environments like a zoo setting, that means getting dirty right along with the staff people.
2. You will be showing the volunteer staff that you are serious about the program being successful and that you are not asking them to do anything you wouldn't do yourself. If it's suitable for you to do it, then it's OK to ask volunteers to do it as well.
3. You will be extremely knowledgeable about the requirements, demands, and expectations for the volunteer opportunity so that when a potential volunteer asks you what they will be doing, you can speak with authority as you describe what you yourself did while completing a volunteer shift.

The other added advantage to completing volunteer shifts in all areas is the thorough knowledge and understanding you will have of all aspects of your agency. Then, when someone is sitting with you during the interview and willing to offer skills that might not currently be in the opportunities bank that you develop, you will be in a position to creatively package something for future assignments within your agency. As you go through these processes, you should remember:

- Link the volunteer assignments directly to the agency mission.
- Link the volunteer assignments directly to assisting staff.
- Link the volunteer assignments to wishes and dreams of the agency.

Some staff will be hesitant to work with volunteers, and as you go through this process you will be able to ascertain how they feel by asking three types of questions:

1. Factual questions get the facts.

- Do you do any volunteer work yourself?
- Have you ever worked with volunteers in the past?
- Are you utilizing volunteers currently?

2. Feeling questions give you some indication on their philosophy.

- How do you feel about working with volunteers?
- What do you think it would take for a volunteer to enjoy working here?
- What do you like most/least/dream about your job?

3. Then, you can rely on some third party questions.

- Some people use volunteers for (state example here), how would you feel about that?
- One thing another department has tried is \_\_\_\_\_, do you think that would work here?

Whatever process or combination of processes you use to determine meaningful position descriptions for volunteers, you must remember that this can be a difficult and challenging aspect to the task of good volunteer program management. However, if you take the time here and create credibility with the staff during the process, you will reap the benefits later as you begin placing volunteers in these areas.

When you think in terms of tasks for volunteers, you should remember Dr. David McClelland's theory of motivation (McClelland, 1985). Let me summarize.

McClelland's theory of motivation places tasks into three categories:

1. Achievement tasks – goal oriented.
2. Affiliation tasks – social in nature.
3. Power/influence tasks – the teachers among us.

With the basic understanding of what motivates people as well as the various methods for determining position descriptions, you can now begin to “package” the various volunteer opportunities for your agency.

As you begin to put tasks together into position descriptions, remember these concepts in reshaping potential volunteer opportunities.

- Job enlargement – you can increase the number and variety of tasks that are included in a volunteer opportunity.
- Job enrichment – you can delegate to the person some functions that are generally considered managerial in nature.

- Work simplification – eliminate useless tasks or combine tasks that are more easily done by one person. This is especially important if a volunteer identifies useless tasks for you.
- Principle of variety – dull or routine tasks may be made more appealing when bonded with a variety of other tasks. My favorite example for this one refers to filing. Hardly anyone likes to file, and that is often the most requested volunteer job. Finding volunteers who “love to file” are hard to come by. However, if you incorporate a little filing with some other more appealing tasks, then you can accomplish your filing while still providing meaningful experiences for the volunteers.
- Principle of continuity – the total task may become more interesting when bonded in a related way to the end product rather than repeating one portion of the task over and over. In other words, if someone understands the end product, they may find the tasks more appealing than just doing one step of the process.
- The sweetener principle – an unpleasant task may become more acceptable when a more appealing task is linked with it in the total job. Another one of my favorite examples: People used to tell me they wanted to work with animals – anything with animals. Now, for those of you who don’t know, most of the work done with animals in a zoo deals with cleaning. And, as you may well imagine, the bigger the animal, the bigger the mess. So, at one agency where volunteers assisted in the morning routine of cleaning the elephant barn (no small task, I might add), the sweetener for them was they

were then able to help give elephants baths once the cleaning was done. Not a bad *sweetener* to be able to get up close and personal with such a grand creature if you're driven and motivated by a love of animals.

Needless to say, negotiation will come into play as you go through this process with your staff. Some basic negotiating principles will be useful for you. To that end, remember that:

- You should know what you want.
- You should be prepared with facts that will help build your case.
- You should have a fair understanding of your opposition.
- You should have your case prepared point by point.
- You should be able to anticipate reactions.
- You should develop a climate of cooperation.
- You should strive to develop a *win-win*.
- You should, by all means, help the opposition *save face* during and at the conclusion of the negotiation.

By taking into account all these factors, an organization will say much about itself by what it asks volunteers to do and how it creates the positions in which they function.

Now that you have a better understanding of the tools by which you create meaningful position descriptions for volunteers, let's discuss recruitment methods. As I go through these, please make a mental note that these ideas and concepts are by no means all encompassing. I often tell new volunteer program managers that their effectiveness is only limited by their imagination and willingness to try new things.

## Targeted Approach

One sure way to recruit volunteers is the targeted approach (McCurley & Vineyard, 1988). The targeted approach refers to the concept of knowing exactly what you are looking for and knowing exactly where to find it. For instance, if you are in the situation of needing volunteers to assist seniors with tax preparation, then your target audience is tax preparers, accountants, and their professional associations.

The targeted approach can take on an individualized approach or a more delegated approach. An example of an individualized approach would be to ask someone you know who worked in publication layout to assist with a newsletter. The delegated approach would be targeted to more people in general. So, if you're looking for people who might be interested in working with an after school program, where would you most likely find these folks? The local network of professional/retired society for teachers and educators would be a good place to start. As you venture into this type of recruitment, you need to look at what types of people are apt to have the characteristics that you are looking for. Then, you must give some thought to what benefits they would receive by performing these duties at your agency, how you will reach this volunteer with the agency's need, and, finally, who from your agency would most likely get a response from this volunteer. Maybe it's you as the volunteer program manager, or maybe it's someone else from your agency who is better positioned with the target audience or has a better rapport with the target audience.



## Non-targeted Approach

This is sometimes called the “warm body” recruitment (McCurley & Vineyard, 1988). Generally, it is best utilized when the volunteer job does not require specific skills or a lengthy commitment. An example would be the many volunteers needed to help with a walk/run event for your agency. Usually, the training required consists of little more than having the volunteers show up, complete a small orientation to tasks required, and provide them with clear and distinct expectations and rules. These types of non-targeted recruitment can encompass flyers, posters, bulletin boards, senior centers, laundromats, volunteer fairs, community events, and local chambers of commerce, – anything is fair game here. Remember, you are limited only by your imagination and willingness to try new ideas.

## Recruitment Message

The most important aspect utilized in either targeted or non-targeted recruitment is the recruitment message (Stallings, 1992). It should consist of no more than three parts:

1. **Statement of Need** – This is the part of the message that states why the position is important to the clients of the organization (not the organization itself, but the **CLIENTS** of the organization).
2. **How the Volunteer Can Help** – This second piece of information should state the activities the volunteer will be expected to perform within the context of the stated need.
3. **Benefits of the Job** – This last piece indicates the exchange the person will receive for volunteering to assist in your organization.

These recruitment messages ideally should be no more than three sentences. They should be short, succinct, and very clear. Think as though you're writing a small ad to be placed in the newspaper. Now, let's look at an example:

1. *The local Meals on Wheels Program needs people to deliver a new route for the homebound.*
2. *You can help solve this problem by offering to volunteer two-three times each quarter to deliver meals to homebound people in our community.*
3. *You will receive the satisfaction of enabling more people to stay in their home for an extended period of time.*

So now that you've identified meaningful position descriptions, mastered negotiation techniques, and written progressive recruitment messages, don't overlook some of the best resources for your recruitment efforts.

- The limited resource population and/or unemployed population. If you structure your recruitment message and training opportunities around "job development" opportunities, emphasizing self-help, this can be a wonderful audience to target. Make sure your materials minimize jargon, paperwork, and delays between the initial interest and potential placement with your agency.
- Persons with disabilities. The criteria within your agency should be the same as for all others. However, make sure that the competence and suitability of the individual is what you address in matching these volunteers. Some may

need extra encouragement and reassurance that they are welcome to your agency.

- College students. More and more college students want an “edge” upon graduation and that comes from the opportunity to complete “internships” within organizations whereby they have the opportunity to do “hands-on” work in the field they are interested in for employment. These are typically short-term, and you must balance the short-term with the investment of training required for your agency. However, I have found this a wonderful resource.

A chapter on recruitment would not be complete without some discussion of the new trends of volunteer styles that are becoming increasingly apparent. It used to be said that it was a trend. However, it's no longer a trend. Now, it's considered a reality. I'm talking about long-term vs. short-term vs. required-term volunteers.

Long gone are the days when someone came to your agency and stayed with one agency for fifteen, twenty-five, or even thirty years. However, the **long-term volunteers** were the people truly connected to your agency. They often shaped their own position over time. Generally willing to work on whatever was needed, they were motivated by affiliation and group achievement.

Move over long-term volunteers, here come the **short-term volunteers**. These people are generally more connected to the cause than your agency. They are willing to help a

worthy cause or group, but their volunteer effort is not central to their life. They are often involved with a variety of organizations over time. A friend or co-worker most often recruits them, and they are motivated by individual achievement. These are the people who will say to you, “Tell me what you want me to do.”

**Required-term** is just that – volunteer or community service that is a requirement from another institution. Volunteers may have been arbitrarily assigned to your agency. There may be resentment on their part for having been “forced” to volunteer. Generally unconnected to and ignorant of your cause and/or your agency, these people are motivated by the desire to meet this outside requirement. Examples of required-term volunteers may include high school students, welfare recipients, court ordered alternative sentencing, public housing inhabitants, and/or those people who have an alternative payment system for local taxes, fees, or fines.

Short-term and required-term volunteers will cause volunteer program managers to take a long hard look at some creative areas for possible change (McCurley, 1997) to keep up with the people who will likely be coming to your agency. As you experience more and more demand for short-term and/or required term assignments, you will have to consider:

- Job-design – potentially increasing the number of “low level” opportunities suitable for those with little experience, minimal skills, and little time for training.
- Recruitment efforts virtually can be eliminated if you can position your agency as the revolving door for some required-term volunteer efforts. As

you delve into this further, your recruitment efforts may be more focused on retention efforts – in other words, how to keep them once their requirement is complete.

- Screening and matching will become more important than ever before. The interviewing process will take on more of a career counselor position.
- Orientation and training will assume greater importance as well. You will be faced with knowing how much information is enough without overloading the volunteer and costing your agency in training time.
- Supervision of this population, who can be unaccustomed to the demands of work, will likely require more time and attention for the supervisor.
- Recognition as stated before will likely focus around activities that are developmental in nature and thus are seen as having value for the volunteer seeking career enhancement.

Today's volunteer program managers have the opportunity to introduce these new populations to the joys and satisfaction that successful volunteer involvement creates.

And the beginning place for the introduction is the interview.

## Chapter Four

### Interviewing – Getting to “No”

Interviewing – that 30-45 minutes where you must seek out as much knowledge about an individual as possible, determine skills and motivations, play amateur psychologist, and offer appropriate matches. How does one do all that in a mere 30-45 minutes? This section will discuss the purpose of the interview, review some key steps in the interview process, give some thought to designing relevant interview questions, discuss listening skills, and propose options for handling problem situations.

#### **Purpose of the Interview**

During that 30-45 minutes that you are meeting the potential volunteer for the first time, you have to use your best judgment in deciphering what they are telling you. Are they serious about volunteering for your organization? Or, are they seeking something that you cannot offer? Please bear in mind that you should be screening for your organization just as much as they are screening your organization. During this time, you must try to determine their motivations, assess matching capabilities with your existing vacancies

and their skills. It is also during this time that you begin the process of screening for any risk for your organization and the clientele you serve. You must begin to think that interviewing is one of the ways to create opportunities for them to say “no” to your organization and for you to say “no” to them. Remember, though, you always want to “save face” for them and protect your agency, your customers, and your clientele.

Screening individuals becomes an important step along the process, largely because placement of volunteers in your agency has an effect on clients, staff morale, volunteer morale, and, potentially, your agency reputation as well. The process of screening for volunteers should be standardized – in other words, make sure you ask everyone the same set of questions. You want to make sure that you follow the same legal guidelines that your Human Resources Department utilizes for employees. Don’t hesitate to take notes as you follow through with your questioning. And remember, have written position descriptions readily available that you can discuss with them as you go through the interviewing process.

### **Interview Process**

When I think about the process of interviewing, I generally consider four parts to the process.

1. Preparation
2. Opening
3. Body of the interview
4. Closing



## Preparation

You should make sure that you set aside adequate time for the interview. Setting aside time reinforces to the potential volunteer the importance of the step they are about to take. Interruptions and excess noise and distractions should be kept to a minimum. The professional demeanor of the interview sets the tone of the entire volunteer opportunity and experience.

If possible, review the application beforehand. This allows you an opportunity to look for any discrepancies and gives you a chance to determine if there is anything questionable that you wish to find out during the actual interview. In order to save time, you may want to forego having them send their application in beforehand. In that case, you should be prepared to take a minute or two and review their application as you begin the formal interview.

It is best to have all the materials that you will need at your fingertips. That includes position descriptions, agency information, general orientation materials, and dates for the next steps. This keeps you from looking disorganized and also reinforces the professional tone you wish to portray for you and your agency.

## Opening

This part of the interview should take just a few minutes but it sets the tone for the balance of the questioning process. Begin by making *small talk* – anything about the

weather, last night's ball game or current events – something to *break the ice* between the two of you. This does not have to be lengthy, but it should accomplish putting the person at ease and making them feel comfortable.

The next part should be focused on clarifying the purpose of the interview. This lets them know that there is a definitive *process* to becoming a volunteer, thus giving them something to think about when it comes to their commitment. You should also let them know what sort of timeframe this process will take.

I wear those funny-reading glasses that go on the end of your nose, and since I don't want to be perceived as looking down over my glasses at someone, I always start my interviews by saying, "I'm going to ask you some questions. There's no right or wrong answer; it just helps me to get to know you better and helps me offer appropriate opportunities for you. I take notes so I can remember what's been said and I wear these funny glasses so I can see what I'm writing. Is that all right with you?"

### Body of the Interview

It's during this section of the interview process that you focus on the general information about the agency, the program, and the opportunities for the volunteers. This is the time that is spent getting to know the person sitting with you. Will they make a good volunteer? Do they come with the best of intentions? Or do you feel a sense of *hidden agendas*?

As you gather more and more information, you can discuss various opportunities that exist within your agency where this person may be suitably matched and placed. It's a good idea to let them know that they do not have to make a decision on the spot. You can present them with different options if possible and reassure them that they will have time to think about their choices and let you know later.

### Closing

The closing can be thought of as the *wrap-up* of the interview process. During this part, you will need to summarize the options you have discussed and give a thorough understanding of the next steps. Do you have a health screening process? A more thorough orientation process? This is the time to let them know specifically what the next steps will entail. The final closing thought is to express your appreciation for having the opportunity to meet with them and discuss volunteer opportunities. If you have determined a date when they will take the next step, close by saying you are looking forward to seeing them then. If an appropriate match is not available, I would encourage honest feedback and sharing. You may want to refer them to other agencies utilizing volunteers.

Now, there is much more that I could say about each of the four sections of the interview process. However, I believe it's more important to focus in more depth on some other skills that you can utilize anywhere in these four sections that will assist you in being a better interviewer.

# Interview Skills

There are two essential skills in interviewing. The first focuses on designing and asking questions based on an analysis of the position and required qualifications. The second focuses on reflective listening, which assures that both individuals hear and understand what is being said. Word your questions in a way that will elicit the information needed to make decisions as to the suitability of the volunteer. It is best to use open-ended questions – those not easily answered by one or two words – to get expanded information. Where possible, let the potential volunteer fill in the details to the questions that are asked.

## Questions

When thinking about the types of questions you would like to incorporate into your standard *set* of questions, you should give some thought to the diversity of those questions. If you ask questions pertaining to motivation and determination of work skills/habits, you will be more likely to determine an appropriate *fit* or placement for the volunteer. Be sure you ask clarifying questions to verify information that is unclear either on the application or something said during the interview process.

Examples of open-ended questions might include:

- What did you like about \_\_\_\_\_?
- How did you do \_\_\_\_\_?

Motivational sorts of questions would be centered around:

- How will this volunteer job fit into your life now?
- What prompted you to take this step of volunteering with our agency now?

Questions that get to the determination of work skills or habits might include:

- What type of supervision would you like to receive?
- What types of things do you like to do?

When trying to determine an appropriate “fit,” suitable questions might be:

- What would you describe as your ideal work setting?
- What would people who worked with you say about you?

## Listening

Let's discuss the *art* of listening!!! I refer to this as an *art* because it takes a lot of patience and practice to become very good at it. Remember that you have a limited amount of time to try to ascertain everything you need to know about an individual. The only thing that will assist you in this process is to hone and utilize the *art* of listening. Not only should you be listening to the words the person is saying to you – you should also be paying attention to those non-verbal cues the person is sending as well. But first, let's focus on the verbal part of listening.

Some of the characteristics to the art of listening include:

- Alertness –not letting your eyes wander or fidget with your fingers, jewelry, glasses, etc. By staying alert, this can stimulate the speaker and improve the overall performance of the speaker and the listener.
- Concentration – staying focused on what the person is saying. The average person speaks about 125 words a minute, but can listen to about 400 words a

minute (Stallings, 1996). This means to be effective, the listener does not jump ahead of the speaker but gives him/her time to tell his/her story.

- **Deliberation** – processing what the person is saying so that you can interpret the full and entire meaning. Try not to prepare your answer while listening but try to receive the whole message before deciding what to say in turn. Sometimes, the last sentence of what the speaker may say gives a new slant to what was said before.
- **Interest** – paying attention as the person is talking to you, sitting forward in a receiving position. Knowing what might be said may involve more than the dictionary meaning of the words that are used. The meaning might also involve the tone of voice, the facial expressions, and the overall behavior of the speaker.
- **Linking** – allow the other person the opportunity to link thoughts, ideas, and expressions together. You as the listener can help with this concept by linking for the speaker. “You indicated that your Red Cross volunteer experience was particularly pleasurable. Can you elaborate on why it was so pleasurable?”
- **Patience** – letting the other person finish their thought or sentence before interrupting. Be sure to observe this and be careful not to interpret too quickly. Look for clues as to what the other person is trying to say by putting yourself in the speaker’s shoes, seeing the world as the speaker sees it, and accepting the speaker’s feeling as facts that have to be taken into account – whether the listener shares them or not.

Some of the pitfalls to listening (Stallings, 1996) show up as:

- Anticipation – thinking that you know what is going to be said next. Spend time listening to understand what is meant, not just getting ready to reply, contradict, or refute.
- Indolence – sending the hidden message of being bothered by something (either physical or verbal) or not wanting to be there in the first place. Try to remember to ask questions to secure more information, not to trap the speaker or force him/her into a corner.
- Interference or impulsivity – interrupting before the thought or sentence is complete. Put aside your personal views and opinions for the time being so you can objectively learn as much as possible from the speaker.
- Suggestibility – leading the conversation in one direction without allowing full range of thoughts and/or ideas.

If you can focus on these aspects of listening, you will be able to determine much about a person. Not only will you be able to determine what the person wants to do for your agency, but also you will be able to determine what is motivating them to be there in the first place and what appropriate opportunities you will be able to offer them that meets their criteria.



# Things to Look For

Some of the dimensions that you want to look for in an interview include:

- Communication – does this person communicate ideas, thoughts, and feelings in an understandable way?
- Continuous learning and growth – does this person demonstrate the concept of always being willing to learn, take on new challenges, and continue the process of growth as a person?
- Initiative – is this person willing to take a risk or chance on new ideas?
- Teamwork/collaboration – does this person appear to be the sort that can work with other people or does this person need to be off by themselves – and do you have either of those types of opportunities to offer them?

## Problem Situations

Needless to say, no matter how thorough the interviewer may be, there will be problems that you encounter. Let's touch on some of these issues and see what solutions there are to them.

*What about the person who is genuinely shy and rather untalkative?* Having a standardized set of questions will be somewhat helpful in this situation. But, sometimes, the interviewee will succinctly answer your questions, giving no more information than asked. In this case, I often rely on a technique called *funneling* (Mundt, 1998). This

utilizes the best skills in the art of listening. The interviewer has to ask a follow-up question to something the interviewee has said. For example:

Interviewer: What do you like to do for fun or enjoyment?

Interviewee: I like to garden.

Interviewer: Oh, what part of gardening do you like to do?

Interviewee: I enjoy digging in the dirt and planting bulbs.

Interviewer: What is it about digging that you find so enjoyable?

Interviewee: I find the digging therapeutic and relaxing.

This is a simple example but can be utilized in almost every instance of questioning.

This does require active listening and serious concentration on the part of the interviewer.

*What if they are just too talkative?* This can be a very awkward situation. We've discussed the pitfalls of listening as interference. However, the interviewer can refocus the conversation and keep the interviewee targeted on the questions at hand. If someone is rambling, refocus him or her and stay on track by reminding them of the initial question to get an answer to the questions that have been asked. Sometimes rambling may be a sign of a more serious problem in the long run.

*What if the person is unmotivated or has an attitude problem?* I'm sure we've all seen this one – the young teenager who is in your office only because the parents want them to do something *productive*. The best method for deflecting this situation is to discuss in detail the expectations for the volunteer opportunity. Ask yourself if you're setting

yourself up for more trouble down the road. You'll surely be dealing with the unmotivated attitude later if you don't deal with it in the beginning. Then, if the person is still rather reluctant, remember that you don't have to take everyone who comes through your doors.

*What happens when someone wants the position but is not qualified for it?* Remember when position descriptions were discussed? This only reinforces the importance of taking the time to think about and put in writing the requirements for doing the volunteer tasks that are assigned. If it's in writing, all you have to do is show them the requirements and discuss the realities of whether or not they can meet those requirements. I would caution that this be done in a fair manner – make sure you're not using the position descriptions as an excuse for your own insecurities in dealing with a diverse clientele. If, however, the issue is just one of training, you can reassure them that you would be willing to assist them in getting the training and that placement of the position is dependent upon successfully completing the training.

*What if the person is worrisome?* Another area of importance to interviewing is that of dealing with perpetrators. I would caution you that if you are working with a vulnerable audience, watch for and beware of perpetrators. One of the things I enjoy about the business of volunteer management is that you get to meet such nice people. In all the years I've done this kind of work, I have met some of the most wonderful, caring, generous, willing to help people who come with the best of intentions. Unfortunately, that is not true 100 percent of the time. And if you keep in mind that you don't have to

take everyone who walks through your door, then you should take time to consider the following:

- Is there a checkered job history? Are there major gaps of time in their employment history? You should review this as thoroughly as if you were going to hire them for employment. Isn't that, after all, exactly what you're doing?
- More often than not, perpetrators have been victims of crime themselves. In this instance, you need to watch for any signals (both verbal and non-verbal) that might indicate the person has been a victim of a crime.
- Often, perpetrators will have a primary relationship with the group of people they are more likely to perpetrate. I'm sure the first image that comes to mind here is a child molester that continues to seek out opportunities to work with youth.
- It's been my experience that perpetrators will become more animated when discussing what volunteer opportunities they'd like to do and they usually have very specific audiences they would like to work with.
- Perpetrators will seem to be fairly rigid and inflexible when you begin discussing various opportunities with them. They will try to stay focused on the one aspect that gives them the best opportunity to keep in touch with the audience they are likely to perpetrate.

# Rapport

As you sharpen your interviewing skills, you should begin to establish a rapport with the interviewee. This is a process of continually building a sense of trust with the other person. Building this rapport focuses on the ability of the interviewer to identify and reflect back on cues from the interviewee. Watch for ticking bombs and warning signs. Simple phrases repeated over and over can be something to delve into a little deeper. (I.e., “I love being with children – I think they are the only people who really understand me.”) Pay attention to body language signals. A word of caution here: Remember that body language for one culture may mean something different or be offensive in another culture. So as you are watching body language, make sure you are reading the body language signals with the correct culture in mind. For example, making and maintaining eye contact is a standard practice for the Western culture. However, in some Eastern cultures, that is not accepted practice. So, diverted eyes or not making eye contact might not necessarily be construed as someone with something to hide. Watch for warning signs – a person with something to hide may not answer your questions directly or not at all by sending the conversation in a different direction.

I also strongly encourage and advocate for paying attention to your *gut feelings* and intuition. People often ask me to explain what I mean by *gut feelings* and intuition. I would love to be able to tell you exactly what it is. However, I can only explain it by asking: Have you ever had the hair on the back of your neck stand up and you didn't know why? Did you ever finish an interview and have an unsettled feeling that

something wasn't quite right, but you couldn't pinpoint what was wrong? If any of these explanations make sense, then you've experienced your *gut feelings* and intuition too. I encourage you to seek out the answers, asking more and more questions until you are truly satisfied. Push yourself to identify precisely what triggered the sense of apprehension (Graff, 1999) – was it the candidate's manner, choice of words, presentation style, body language, attitude? If you can identify it, then you can explore it. Is it a legitimate cause for concern, or is it merely a reflection of discomfort with a *difference*? Again, sometimes there may be a simple explanation, or it could be something that is culturally sensitive. Whatever the reason, keep seeking answers until you are comfortable with your decision for placement. When all else fails, get a second opinion. Or, ask the individual to undergo further screening by participating in an additional interview with key staff with whom they will be working. Follow up on performance assessments and put them on a *probation period* until you are comfortable the placement will be a good one.

If, in those rare instances that you do not feel comfortable, always remember – *you don't have to take everyone who comes through your door*. You owe it to yourself and your agency to screen these potential volunteers just as strongly as they should be screening your agency.

Now that you've identified volunteers who *know*, the focus shifts to keeping them.

## Chapter Five

### Supervision

You've identified an appropriate cadre of volunteers. Now, supervising them becomes an important aspect of keeping them. I can't help but be tickled by the idea of teaching someone about supervision of volunteers. The reason I think this is such a dichotomy is that each and every one of us knows exactly how we wish to be treated. And that treatment includes:

- Fairness
- Honesty
- Integrity
- Openness
- Respect
- Understanding

So why should it be any different for volunteers? Supervision should be treating everyone like we ourselves would like to be treated. In other words, all the things that makes a good person good. However, there may be some inherent problems with some staff when placing volunteers in your agency. This is largely due to the misconception that:

- Volunteers will be regarded as an added burden to their already heavy workload.
- Volunteers are regarded as low-skill and low-commitment.
- Volunteers must be treated with kid gloves and bad performance by volunteers will be tolerated by the agency.
- Volunteers may do the job better than the staff person can thus making him/her look bad.

With this perception by your staff members, remember that perception is considered reality. But, now I'm getting ahead of myself. Let's start at the beginning on the topic of supervision.

First, you should define the role of the supervisor of volunteers. Will this person have sole discretionary say and authority over the volunteers, or will it be done in conjunction with the volunteer program manager? Whatever the decision, in defining the role of the direct supervisor, it is important to remember the following things.

- Time commitment for each volunteer – Some may have more disposable time to spend with your agency and some may have very limited time. In either case, the staff person supervising the volunteer should do everything possible to understand the commitment of time and honor it by not wasting the volunteer's time. Remember that paid staff generally work established hours and have some continuity from day to day, whereas volunteers have a choice of hours and they must be updated on news, policy, and direction changes each time they come to your agency.



- **Inclusion –** Based on whatever time commitment is indicated by the volunteer, the staff person should do as much as possible to include the volunteer in the department or agency functions, information, and updates. The volunteer must feel a part of the work unit. This can be accomplished through a warm, friendly atmosphere. The office climate should reflect a spirit of cooperation and interest. Volunteers and paid staff should work together to create a welcoming atmosphere to the agency or department.

No one action is more telling than having a volunteer arrive on their first day and be greeted with confusion and delay while you or the staff supervisor put something together to keep them busy. Give serious consideration to the volunteer's first day and greet them warmly. Show them the physical environment – coat closet, where to put a purse, restroom – and orient them to the general duties and tasks.

- **Recognition and Compensation –** Although the compensation for the volunteer may not come in a monetary way, the supervisor should always be aware that recognition and compensation come in a myriad assortment of other ways. A good supervisor will continually identify with and recognize volunteers, thus rewarding them with the compensation they seek – personal attention and recognition for tasks well done. Recognition comes in two types: formal and informal. Formal recognition includes things such as events, luncheons, birthday cards, certificates, and appreciation gifts,

but ongoing informal recognition – things such as effective involvement, effective interaction, “hellos” and “thank yous” – is the one that should never be forgotten.

- **Accountability** – It doesn’t matter that this is a volunteer – the person doing the tasks should be expected to be accountable for the quality of the outcome. The agency or department has the right to hold all individuals, both paid staff and volunteer staff, to the same standard of expectations. However, the agency also has the responsibility for providing adequate workspace, supplies, equipment, training, and support. The hardest part comes from the fact that the expectations for the accountability has to be made clear to the paid and volunteer staff so they know and understand the standard to which they will be held.

It is a good idea to clearly explain the vision of your agency. Define responsibilities, goals, authority, support, and expectations of the tasks assigned to the volunteer.

Don’t be afraid to set realistic timelines so the volunteer understands the importance of tasks accomplished. Be sure to provide feedback to the volunteer as they work on accomplishing the tasks in the identified timeframe. Be honest and forthright in providing feedback and information.

- **Understanding motivation** – Keep in mind that motivation comes from within. The direct supervisors can be successful only if they take the time to try to ascertain what is motivating the volunteer. The volunteer motivated by achievement, affiliation, or influence can have tasks assigned accordingly. But it is the responsibility of the

supervisor (in conjunction with the volunteer program manager) to take some time to try to determine which motivation is driving the volunteer and keep aware of what the volunteer likes to do.

- **Reviewing performance standards** – The volunteers need to know what the agency expects of them in terms of knowledge, skills, and abilities. They will also need to know how they relate to others within your agency and also how they relate to clients of the agency. To be successful, they will need to know how the work is organized and performed at your agency.

Some common sense tips include knowing all you can about your volunteers, communicating expectations, providing feedback, making decisions, settling grievances, dealing with problem volunteers, and maintaining a sense of humor.

- **Mutual expectations** – Once again, I can't stress enough the importance of clearly identifying the expectations for each volunteer. Most people want to be successful, want to do a good job, and want to be helpful. The most common mistake in supervision is lack of understanding the expectations. The agency has expectations of the staff. So too, the agency should have expectations of volunteers. Each volunteer's goals must be compatible with the agency's goals for a successful match. However, the expectations and plans must be clearly defined. So, take some time in the beginning of a new relationship with a volunteer to clearly identify mutual expectations.

Second, let's talk about four basic concepts one should consider when supervising volunteers.

1. The staff and volunteers who are in a supervisory position must understand the roles and expectations the agency places on them. As such, good supervisors will be prepared to orient a new volunteer to the job, the workplace, and the environment. There will be a clearly defined written position description. Introductions to staff and volunteers will be a part of the first day routine. They will explain any relevant policies, procedures, and work rules as well as the reporting requirements so expectations are clear.
2. People who are good supervisors of paid and/or non-paid staff share some key skills and characteristics. Most often, from a professional standpoint, things on this list would include:
  - Ability to build a team
  - Ability to coach
  - Ability to communicate
  - Ability to deal with conflict
  - Ability to delegate
  - Ability to evaluate
  - Ability to listen
  - Ability to motivate
  - Ability to plan
  - Ability to problem solve
  - Ability to recognize efforts
  - Ability to set standards
  - Ability to share knowledge

- Ability to train and/or teach

However, good supervisors also come with some personal qualities that are part of the mix of a good supervisor. Those things include:

- Ability to allow others to grow
- Ability to be consistent with all staff
- Ability to empower others
- Ability to have a positive attitude
- Ability to model good behavior
- Ability to be supportive
- Ability to be trustworthy

3. There are some unique aspects to supervising volunteers that are different than supervising paid staff. As discussed earlier, volunteers are there on a part-time basis. There may be confusion over who is the supervisor. Volunteers may feel freer to leave if they are dissatisfied with the experience. If you are dealing with an Affiliation motivated volunteer, it often means supervision will take more time. There is the misconception that it is difficult to confront a volunteer over work performance. Volunteers may need to be more flexible in their expectations as well. However, good supervisors will offer an opportunity for feedback to the volunteer so improvements can be made. This may come in the form of continuing training or it could include coaching or recognition for a job well done. Sharing information and materials with the volunteer staff is another way to provide feedback and lets them know they are really a part of the team.

4. The supervision system within each agency can differ. But, minimally, the supervisor should have some open time for scheduling appointments. Monthly group meetings or, if that doesn't work, scheduling individual meetings can accomplish this. Sometimes *management by walking around* is sufficient. The best determination of how good a supervisor someone is can be measured by the success of those who report to you.

Remember that good supervision takes skill and time. The staff given the responsibility of supervising volunteers will need to understand that good supervision takes time in the beginning but in the long run saves time and enhances the volunteer's performance. If the management level within your organization does not clearly understand this and commit to it, they probably will not be supportive of the time needed to invest in establishing good supervision practices. If after some education, senior management continues to provide nothing but lip service, I would encourage you to consider looking at your career path and determining if it's time for a change. I was facilitating a workshop when a young woman in the audience began relating the frustration she faced with management at her agency. She elaborated that the program functioned because she was committed to providing the services done by volunteers. Her supervisor had already told her that she didn't think the time invested was worthwhile. This young woman asked me for advice on how to handle the situation. After contemplating the situation for a moment, I told the young woman that she should seriously consider if she really wanted to continue working for an agency that was not committed to what she passionately believed in. Tough choice, one I don't envy anyone to have to make.

## Chapter Six

### Recognition

I think Sue Vineyard summed it up best by noting that recognition is not so much *things* as it is an attitude. If you recognize the value of volunteer efforts properly, you will always have a supply of volunteers.

Whatever your recognition entails, it should provide an opportunity for creative thinking. It should be volunteer oriented with an emphasis more on intangible than tangible. Based on a relationship of respect and appreciation, it should be transmitted into everyday language and action.

In Chapter Two, there was a discussion regarding Dr. David McClelland's theories of motivation. This again comes into play when dealing with recognition of volunteers. Recognition events tend to satisfy the Affiliation motivated volunteers more than the Achievement or Influence motivated volunteers. That is why it is important to customize your recognition to include an assortment of ideas, concepts, and events to appeal to a broader base of volunteer motivations.

As you think about recognition, you should consider: Are volunteers made to feel welcome and appreciated? In what ways – both formally and informally? Whose responsibility is it to provide recognition – yours alone or everyone's? Do you have funds for recognition efforts?

Let's look at each of these issues.

*Are volunteers made to feel welcome and appreciated?* This starts at the very beginning of the relationship with each volunteer. The initial contact from the volunteer to your agency sets the tone early on. That tone is reinforced during the interview, screening, and placement process. The relationship is solidified on that "first day" when the volunteer meets the staff they will be working with for the first time. It is the volunteer's supervising staff who is responsible to keep the volunteers tuned in so they do feel welcome and appreciated.

*In what ways – both formally and informally?* There are some intangible ways to help with this concept. These intangible rewards are those everyday informal ways that you say, "We're glad you're here." For example:

- Calling the volunteer by their name
- Greeting them warmly each time they arrive
- Inquiring about their concerns
- Keeping them informed about agency updates
- Saying "thank you" every time they leave
- Sending a card or phoning them when they are sick
- Asking for their thoughts and opinions



- Involving volunteers in staff meetings
- Giving them new responsibilities
- Teaching them some new skill
- Spending time and effort in supervising them
- Maintaining a personal interest in them

The volunteer effort deserves this type of continual recognition. Nothing mentioned above causes undue burden on each person's workload, but it is of utmost importance to the continuing efforts of volunteers within your agency.

The more formal recognition efforts include things such as:

- Annual banquets, luncheons
- Honoring a "volunteer of the week" or month or year
- Certificates
- Publicity of the volunteer efforts
- Service pins
- Thank-you gifts

*Whose responsibility is it to provide recognition – yours alone or everyone's?* While it is generally the responsibility of the volunteer program manager to plan and execute the formal volunteer recognition (especially if it is an annual event), volunteer recognition should be everyone's responsibility. That doesn't mean that you as the volunteer program manager cannot call on a committee of sorts – comprised of staff and volunteers – to assist with some planning and coordination. However, everyone should be

responsible to speak to volunteers as they encounter them in daily duties as well as value their efforts as they become part of your organization or agency.

*Do you have funds for recognition efforts?* If your agency is fortunate enough to have set aside funds for volunteer recognition, please consider yourself lucky. If on the other hand, your agency is financially strapped, be creative. Most companies are willing to donate merchandise for volunteer efforts. Ask for discount coupons for restaurants, movie theaters, or specialty shops. Merchants are likely to respond to these requests because it will generate business for them as well.

It is my personal belief that leaders make sure all people feel appreciated. As leaders of volunteer efforts, that is our challenge as well. However, you must remember the following ideas and concepts.

- Frequency – I don't think anyone has ever said: "They thanked me too much." I would encourage you to give it often – not just during National Volunteer Recognition Week.
- Varied – Don't be afraid to use a variety of methods throughout the year. Be creative!
- Honest – Don't praise someone just to be praising him or her. Make the comments honest. Your challenge as the volunteer program manager is to look for the good in each person.

- Appropriate – Remember that recognition comes in all sizes – a simple thank you for completion of regular tasks is appropriate. However, if a volunteer goes out of their way to accomplish a big project, then something extra is appropriate.
- Consistent – If you do something for someone because of a particular action, then you must be consistent and do it for everyone.
- Reward what you want more of – Focus on what's going right and praise it.

Remember that recognition is one of the most powerful motivators to human performance. If people do not get recognition, they may seek other places to volunteer or work. Simply stated, it's treating people individually like each one of us would want to be treated.

You now have an understanding of recruitment, interviewing, supervision, and recognition. But how does all the paperwork fit into this process? Let's consider forms, forms, forms.

# Chapter Seven

## Forms, Forms, Forms

### What's required and what's nice to know

In the potential avalanche of forms and paperwork, what do you really need? This section will discuss the various types of forms, the rationale for these forms, identify what's required on forms, and which ones are a *must-have* for the volunteer manager. Let me say that you shouldn't feel as though you alone have to design any and/or all of these forms. There are several templates available for customization to individual agencies. See the bibliography for resources and the appendix for basic templates for use in a volunteer program.

When I think of forms, I categorize them into three broad areas

1. Forms for processing volunteers
2. Departmental procedural forms
3. Orientation and/or training forms

## **Forms Necessary for Processing Volunteers**

- Position descriptions
- Applications
- Interview forms
- Service agreements
- Evaluations
- Exit interviews

### **Position Descriptions**

The volunteer program manager and the staff person who will supervise the volunteers should develop these forms. They should mirror the same type of format utilized for employees at the organization. As discussed in Chapter Three, they minimally should include title, qualifications, duties, supervisor, as well as requirements to complete the tasks assigned. Let me say a word about requirements. These requirements should include things such as minimum age (if necessary), time commitments, any physical and mental demands. An example would be if someone were required to lift 50 pounds in order to complete the tasks assigned. This is an area where you should be very specific.

The position description should also be a place that describes expectations – both on your side and the volunteer's side. Once the position description is written, ask yourself the following questions: Does the volunteer know WHAT to do? Does the volunteer know HOW to do the work? Does the volunteer know WHY they are doing the work?

Your position descriptions will become the foundation for recruitment, interviewing, screening, placement, and risk management. Therefore, time spent during a thorough thought process for completing positions descriptions will benefit the volunteer program manager in the long run.

### Applications

The application also should mirror those utilized by the Human Resources Department of your agency. You are allowed to collect basic demographic information needed for the program. Applications should be completed for anyone who will be doing something more than a one-time event or function (i.e., a walk/run event). Applications are important because they provide a tool for screening potential volunteers. It is important to screen volunteers to provide good matches, find stable and reliable volunteers, determine volunteer motives, gauge whether volunteer expectations are real, and determine the level of commitment and responsibility.

When putting your application together, bear in mind that there are things that can legally be on an application and there are some things that are illegal to ask. You would be wise to follow the guidelines of your Human Resources Department or check out local laws governing this area. It is legal to ask if the volunteer applicant is a citizen if that is something you need to know. If there is a minimum age criteria, it is legal to have a blank on your application asking “Are you over fourteen?” or whatever your requirement might be. You can ask for the volunteer applicant’s employment history. It is legal to

ask questions concerning any convictions if it is relevant to the job functions. And it is perfectly legal to ask what languages are read, spoken, and/or written.

Things that are illegal to ask include race, color, religion, gender, national origin, height, weight, marital status, number of children, childcare issues, transportation issues, and age. Bear in mind, that if transportation or age is relevant to the particular volunteer opportunity for which you are recruiting, then it is perfectly safe to ask those types of questions. An example would be: If you are screening for a driver for Meals on Wheels, it is perfectly safe to inquire about their mode of transportation and if they have valid driver's license.

### Interview Forms

In today's world of legalities, liabilities, and risk management, I strongly advocate for an interview form. This form allows you to have a standardized set of questions that you can ask everyone. This allows you to ascertain the potential volunteer's interest and motivations. If the questions are thoughtfully prepared, it leads the interviewer into offering appropriate opportunities for the volunteer. When you are designing this form, use direct questions. You can always ask follow-up questions to the standardized questions, but you will at least have the same form on every volunteer that you interview. If anything comes back to haunt you, you can show that the person was treated no differently than anyone else at your organization.

The interview form keeps you focused as you spend the 30-45 minutes with this person. During the interview, you can observe the level of commitment based on their follow-through. You must also realize that some volunteers will screen themselves out of your program. You should not feel as though you did not do a good job if some of the folks complete the interview and you never hear from them again.

When you are thinking about designing the interview form, along with the questions considered in Chapter Four, here are some *power questions* that you might include:

- How would your best friend describe you?
- What accomplishments are you most proud of and why?
- What do you want to get back from this effort?
- If you could be any animal, what it would be and why?
- Describe your mental picture of what you see yourself doing as a volunteer for our agency?

### Service Agreements

A service agreement is an opportunity to put in writing the specific expectations of what the volunteer will be doing for your agency and what you will be providing the volunteer. This is the time to describe the specifics regarding time commitment and the opportunity the volunteer will be performing. Bear in mind, the use of the tool will provide the basis for future evaluation, performance improvement, and, if necessary, termination. The expectations outlined can be very general or very specific, depending on what you want to accomplish with the agreement, but it should minimally include time commitment and volunteer position.



## Evaluation Forms

When you take a look at evaluation forms, they fall into three different aspects of categorization. There are forms for:

1. agency evaluation
2. program evaluation
3. volunteer evaluation.

**Agency evaluation** forms are needed when the agency is trying to determine its readiness for volunteers to be utilized successfully. Sometimes, it is important for the agency to assess its image, norms, and/or culture. You can even take this one step further and assess the potential for change within the agency. Evaluations of this type allow the agency to get a *read* on how your employees, your clients, or your volunteers perceive your agency and the general public. Based on information gathered through an agency evaluation, you may find out that you have some built-in obstacles to overcome as you progress with recruiting volunteers. For instance, if you are perceived to be located in a not-so-safe area, then you need to be ready to address those concerns as you begin the process of recruiting, screening, and placing volunteers who may be interested in your agency and/or cause. An agency should never compromise themselves by trying to *hide* uncomfortable issues. Rather, dealing directly with them and offering potential solutions to volunteers will well serve the agency in the long run.

**Program evaluations** give the volunteer program manager a good *read* on staff assessment of volunteer involvement. They also can be geared to volunteers, gaining the

volunteer perspective of the volunteer program. Another area of program evaluation centers on the assessment of volunteer management practices as well as assessment of the recognition efforts by your agency. Good program evaluation tools will answer questions such as:

- Is the program proceeding according to plan?
- Are the intended results materializing?
- What are the intended outcomes – both positive and negative?
- In what ways can you improve?

Sometimes, program evaluation tools can also provide you with an assessment of educational needs of the staff working with and/or supervising volunteers. These types of assessments do not have to be done annually, but rather can be done periodically – once every two or three years.

**Volunteer evaluations** help the volunteers work towards their full potential. These evaluations help the agency better involve volunteers. They should be based on the position descriptions that were discussed earlier. Some agencies have a probationary period as part of the normal process of the volunteer program. In those instances, volunteer evaluations allow for an opportunity to redirect behavior or skills of the volunteer or, in some situations, allow an opportunity to exchange for something that will be a better match for the volunteer. When conducting volunteer evaluations, follow the **RAP** method: **R**everview the past, **A**nalyze the present and **P**lan for the future. Remember the three rules in preventing and dealing with problem situations.

1. You have to deal with the problem.

2. Prevention is preferable – if you organize the work well, engage the right person, and provide support, performance problems will not appear.
3. Separate behavior from performance. Behavior is something the volunteer is doing. Performance relates to the results of the work.

### Exit Interviews

I often laugh to myself when I talk about exit interviews. The information you can gather from them is excellent in providing feedback to make improvements for your program. But, getting them is the tough part! More often than not, volunteers seem to *wander away* from your program with no definitive ending date. However, if you can do them, exit interviews should cover the time parameters of the volunteer service. It should be structured so that you attempt to determine why the volunteer may be leaving. You should ask questions about what they liked best and/or least about their volunteer efforts while at your agency. This evaluation tool can provide honest feedback for improving your program or some aspect of the program that may be driving volunteers away.

### **Departmental Procedural Forms**

- Policies and procedures for the department and the organization
- A volunteer handbook
- Time sheets
- Staff request forms

### Policies and Procedures

Every good program should take time to create the formal policies and procedures for operation within the volunteer program. Often, these policies and procedures will *mirror*

those for employees but they should be specifically geared to the volunteer force and not exactly the same as for employees. Policies and procedures provide for consistent patterns for volunteer involvement and can be thought of as the work rules for volunteers within your agency. Comprehensive policies and procedures can actually function as a risk management technique by educating the volunteer force before they actually begin their duties. If you are dealing with a vulnerable population and fear some particular behaviors, those are the things that you should consider creating a policy for. Thoughtful policies and procedures can also provide a helpful tool for discipline and/or termination of a volunteer if necessary.

### Handbook

A handbook is a useful tool that outlines the basic work rules for your organization. It should include but not be limited to topics such as Equal Employment Opportunity Commission (EEOC), harassment, smoking, appropriate attire and/or uniforms, confidentiality, and any other area of concern that may crop up with volunteers working within your agency. This handbook differs from the formal policies and procedures as outlined above but it should include in simpler language some of the same topics.

Topics for inclusion in the handbook can range from a welcome letter from the president or executive director of your agency to agency information, mission, and history. Standard guidelines regarding the use of the agency facilities, safety and emergency procedures should also be included. It is a good idea to include the volunteer process from application through placement, attendance, and supervision so that each volunteer

### **Handbook Topics for Inclusion**

- Welcome letter
- Agency vision, mission, values
- Volunteer Services Department mission
- How to become a volunteer
- Attendance/absence policy
- Signing in and out for duties
- Reporting accidents/illnesses
- Volunteer rights statement
- Corporate compliance and/or conflict of interest policy
- Harrassment
- Uniform/appearance policy
- Safety plan in event of a disaster
- Benefits of being a volunteer
- Rights as a volunteer

knows that they followed the same process as other volunteers. If your program offers any sort of reimbursement (for mileage or out of pocket expenses), this information should be outlined in the handbook as well. If there is a particular structure (as in a Guild or Auxiliary) to the volunteer force, that should also be outlined in the handbook. It's also a good idea to discuss the relationship between the Guild or Auxiliary and the volunteer services

department to delineate lines of authority and responsibility.

This handbook can be produced in a professional manner by being printed and/or professionally bound or more simply done by stapling several pages together or providing a notebook with appropriate information. At minimum, it should include the specific rules by which volunteers will operate within your agency.

### **Time Sheets**

It doesn't necessarily matter how – but keeping track of each volunteer's time is essential in providing value and depth of accomplishments for the volunteer program. The time sheet can be done manually – each volunteer signing in and out, indicating the area of volunteer activity. In a more sophisticated environment, computer touch screens can provide a means for volunteers to clock in and out while tabulating total volunteer hours as part of the process. If you stick to a manual system, your sheets can be geared for

various volunteers signing in for each day or each volunteer can keep track and give you an update at the end of each month.

Sometimes, volunteers will tell you they don't care about the volunteer hours that they accumulate – that's not why they're there. So I would remind you that having them sign in and out is a safety net for the volunteer program from a liability standpoint. If you need to verify attendance records, or worse, if there is an injury, you need to know that the volunteer was *on the clock* during the time they profess they were. I have had the situation where someone needed to contact a volunteer in an emergency. If the volunteers don't sign in, you can't verify or even connect with the volunteer who might be on duty at any specific time.

### Staff Request Form

I believe this is one of the most crucial forms necessary for running a smooth program. If you are in a program that utilizes volunteers in a more consistent, on-going manner, then you have accomplished this form with the position descriptions. However, if you are operating in an agency that utilizes volunteers for special events or short-term projects, this form can be a lifesaver. This form gives the volunteer program manager directions on exactly what is needed and what types of skills are required when the volunteer program manager is looking to recruit volunteers to assist with a special event or short-term project. Information should include:

- Description of work – as specific as possible
- Length of commitment

- Number of volunteers needed
- Skills required
- Staff contact
- Timeframes

For your own sanity's sake, I would encourage you to establish guidelines for timeframes that provide the ability for you to plan accordingly. For instance, a minimum of two week's notice for more than one or two volunteers can be a set requirement within your agency. Now, I know there will be times when something crops up at the last minute, and while it is outside the parameters of the set guidelines, you certainly can still try to fill the request. However, that should be the exception – not the rule. Something as simple as established guidelines speaks highly of the professionalism with which your program will be viewed by your volunteer force. They know they will not be called in willy-nilly to fill some urgent need at the last minute.

This form can then be utilized for your recruitment efforts. Once volunteers have indicated a willingness to assist, the form can then be utilized as the information sheet that is mailed to the volunteer so they know exactly the where, when, who, and why for the activity.

### **Orientation and/or Training Materials**

- Assignment forms
- Orientation checklists
- Job specific materials

### Assignment Forms

The assignment form is a method of letting each department know of a volunteer placement. It includes the starting date and time that the volunteer will be expected to arrive. Any additional information pertinent to the first day of orientation can also be included with this form. This eliminates volunteers showing up and being greeted with “I didn’t know we were supposed to have a new volunteer today.” This form can also include some basic demographic information on the new volunteer so if the department needs to contact them, they will have a phone number or address.

### Orientation Materials

Things that can be included here would be the handbook. The orientation should also include discussion of the policies, goals, procedures, culture of the agency. This is the time and place to discuss risk management, liability issues, and insurance issues. Some organizations are required to conduct orientation on very specific aspects of the volunteer position – infection control issues if dealing with healthcare and/or animals or the use of hazardous materials in the workplace. Orientation materials should covers two different aspects of orientation. The first aspect would entail the broader concepts of culture and climate of your agency, and the second more simple aspect would deal with the day-to-day things as where is the fire alarm, where to put a purse, hang a coat, and where are the restrooms. The departmental specific orientation – how particular tasks are done within the agency and what the parameters are for accomplishing the tasks assigned – should be done by the department staff that will be supervising the volunteer.



The best method I have found for this is a checklist that is routinely discussed on the first day with each volunteer. The volunteer and the staff person conducting the orientation both sign off on the form and then you have documentation that orientation to the specific area has been completed.

### Job Specific Materials

These materials can be done in conjunction with other departments or they can be customized to each department within your agency. The specifics should focus on duties and information relative to the placement of the volunteers and the tasks or duties that the volunteer will be expected to perform.

### Must Haves vs. Nice to Haves

I've covered several different types of forms and the rationale behind having those forms in place. But in reality, some agencies just don't seem to have the time or wherewithal to get everything accomplished. So, I've provided a list of what I consider are *must haves* for you. Those include:

- Applications
- Assignment forms
- Handbooks
- Policies and procedures
- Position descriptions
- Service agreements
- Time sheets

In the category of it would be *nice to have*s, I've included these forms:

- Agency evaluation
- Exit interview
- Interview form
- Job specific information
- Program evaluation
- Staff request
- Volunteer evaluation

The final category of forms focuses around what you *may want to have*. Sometimes your specific agency may have requirements that some agencies do not. In those instances, you may be required to keep:

- Criminal background check
- Driving records
- Health screening information

As previously stated, you are not on your own here. There are a variety of templates available to you through resources in your community or by publications dealing specifically with forms for volunteer management, including this book.

The best advice on forms I can leave you with is this: Take the time up front to put some of these things in place and it will pay off for you in the long run. For example, one area where good forms management can pay off is in risk management. Let's take a look.

# Chapter Eight

## Risk Management

Let's take a moment to consider risk management. There are different kinds of risk management that we, as volunteer program managers, must think about. Let me clarify.

### **The Process of Involving Volunteers Within Your Agency**

If you're taking over a program in an agency, I would encourage you to do some homework and make sure the processes are in place before you begin anything else. If you're setting up a program, you have the luxury of defining the process before you begin anything further. Either way, by formalizing the process you minimize the risk of anyone coming back with a lawsuit against your agency for not allowing him or her to volunteer or for the way they may perceive they were unjustly treated. Now, what do I mean by formalizing the process?

- First, review the agency policies and procedures. Clarify exactly how much of what is in the agency policies and procedures you wish to cover within the volunteer program. And then, put that in writing. Utilize the same format for the volunteer program that the agency utilizes. If you're working with a vulnerable audience, don't

be afraid to identify behavior that you may fear and write a policy stating how that behavior would be handled should it arise.

- Consider the handbook as the “work rules” for the volunteers. Cover all types of information, including simple things as what to wear and some of the more complex information such as liability for the volunteers and what to do in case of an injury while on volunteer duty. I can’t emphasize enough, if you give some thought to these areas and take the time necessary to put the process in place, it will circumvent potential problems in the future.
- As previously stated, before you begin your recruitment efforts, concentrate on writing position descriptions. Don’t be afraid to get very detailed and specific in what requirements are necessary to complete the tasks requested. For example, in an animal care situation, if someone has to be able to read, walk, stoop, climb, follow safety instructions, and lift 35 pounds in order to be able to adequately and safely work with animals, the position description should include a statement indicating that. Then, when interviewing someone who clearly cannot meet the stated requirements, you can point to the written position description and cannot be charged with discrimination.
- As you begin the interview process, this is another area of potential risk. Again, utilize applications and interviewing forms similar to those utilized by the Human Resources Department within your agency. By keeping everything the same, it minimizes your potential risk for discrimination charges. I would again encourage you to “follow your gut” during the interview process. In those instances when something doesn’t feel right, strive to determine what it is that troubles you and see if

it's something that can be resolved. Because you don't have to take everyone who comes through your door, having an adequate process in place will minimize potential for trouble if you turn someone away.

- Utilizing a service agreement upon placement allows you to have a written document whereby the agency and the volunteer are agreeing on what the volunteer will be doing. This becomes the basis for future evaluation, especially if re-assignment or termination is necessary because the volunteer cannot meet the expectations. Some agencies build in a probationary period that allows you and the volunteer to sit down and review performance levels. Remember to deal with problems as they arise, separating behavior from performance in the situation where re-assignment or termination is warranted.
- The orientation process is another area where you can set the stage to minimize risk for your agency. Don't be afraid to discuss risk management issues at this juncture, including but not limited to liability, insurance issues, and what happens if the volunteer sustains an injury. This is a good time to review the policies, procedures and the handbook that each volunteer should receive.

## **Liability Risks**

Legal liability for injuries is governed primarily by tort law. The principle objective of the tort system is to compensate injured parties and foster due care. There are some aspects of the tort system that you should give some thought to as you formulate your process.

- In most cases, tort law imposes liability only if someone was negligent, that is, failed to act with the care that a reasonable person would have exercised in the same situation. Proof of negligence depends on the facts of each case.
- Vicarious and/or direct liability comes into the picture when the negligence of the volunteer can be transferred to the agency, making the agency liable for any damages. For example, an injured party might allege that the agency was negligent in selecting volunteers, determining the skill level of the volunteers, or did not provide adequate supervision of volunteers.
- Some agencies may implement techniques, which would shield them from liability issues. These could include protective agreements, waivers and releases, disclaimers, and hold-harmless agreements. If you choose to utilize any of these tools, I would strongly suggest that you have the documents reviewed by legal counsel.
- Generally, most agencies that I have been involved with have covered the liability of volunteers right along with the liability carried for the employees. Some may take the total number of volunteer hours and determine the full time equivalents (FTEs) and base the fee on how many FTEs are made from your volunteer force. Check with your Human Resources Department or administration to determine how this issue is to be covered within your agency.

### **Insurance and Indemnification**

Insurance offers a middle ground between the extremes of completely eliminating risk and accepting full financial responsibility for any and all harm. In addition, insurance provides a margin of security for your agency.

- Insurance cannot make risks go away. However, it can provide peace of mind for everyone protected – both the agency and the volunteer. Generally, the insurance needs can be satisfied with little effect on the company's overall insurance strategy.
- If you have volunteers working with a particularly vulnerable audience or participating in risky tasks, you might encourage your volunteers to consider coverage under a general liability policy through their personal insurance agency. Most homeowners' and renters' policies include liability coverage in addition to insuring against damage to the policyholder's property.
- In some instances, it just makes good business sense to restrict volunteer activity. If adequate training cannot be provided in order to minimize risks, then a volunteer program within the agency may not be appropriate. Volunteers who are not competent to perform specific duties and tasks may present an unacceptable risk to themselves, let alone the clients of your agency.

Volunteer programs come with risks as well as benefits. Putting a face on the risks makes them easier to deal with. The good news is that the goals of running a good volunteer program and controlling the inherent risks of that program are compatible. Take some time in the beginning to evaluate and readjust the program to minimize for risk. Don't be afraid to ask other volunteer program managers what tools they utilize to minimize risk. Networking can be very helpful when scrutinizing an existing program or starting a new one.

## Chapter Nine

# The Value of Networking

You are probably the only one in your organization or agency that is directly responsible for managing and servicing volunteers. And though this profession is very rewarding, it can also be very draining as you try to meet the demands and needs of each individual that volunteers at your agency. That is why it is so important to become active in some sort of local networking opportunity.

Called DOVIA's (**D**irectors of **V**olunteers **I**n **A**gencies) in the early days of the volunteer management profession, these networking opportunities allow you time to come together with peers, exchange ideas, and refresh yourself on the rewarding aspects of this profession. There are many different network frameworks, but check within your local area to see if there is a DOVIA in existence. If you're brand new to the field of volunteer management and not sure where to start, check with the volunteer program managers in other similar agencies or, you can check with the local volunteer center in your area.



If there are no local networking opportunities, consider networking online.

[www.cybervpm.com](http://www.cybervpm.com) offers a wonderful opportunity to learn and research various topics related to volunteer management. And cybervpm offers a listserve so that you can network and communicate with volunteer program managers from all over the world. If you have questions, just post your question and let the answers and thought provoking discussion ensue. You'll surely not be disappointed.

Another opportunity for networking is the Association of Volunteer Administration.

Located in Richmond, Virginia, AVA offers

- Advocacy for the value of your role among fellow staff, supervisors, board members, funders, and the public at large
- Current trends and news affecting your work
- Linkages and resources to help you and your organization maximize the involvement of volunteers
- Networking with colleagues in a wide variety of settings around the globe
- Opportunities to develop your skills and increase your expertise
- Professional credentialing

AVA offers a wonderful annual conference that is an excellent opportunity to meet and network with nearly one thousand colleagues from around the world who are all involved in volunteer program management.

The Points of Light Foundation, located in Washington, D.C., has a stated mission of engaging more people more effectively in volunteer community service to help solve serious social problems. The Foundation is a nonpartisan, nonprofit organization devoted to promoting volunteerism. The Foundation, although based in Washington, D.C., works

in communities throughout the United States through a network of more than five hundred Volunteer Centers. They also offer an annual conference as well.

In Chapter One, I mentioned the Independent Sector. With a mission to promote, strengthen, and advance the nonprofit and philanthropic community to foster private initiative for the public good, the Independent Sector does research on pertinent volunteer management topics. They provide volunteer program managers with information relative to trends of volunteerism within the United States and the value of what volunteers are doing. The Independent Sector is also located in Washington, D.C.

There are other more specialized professional associations such as:

- American Society of Directors of Volunteer Services (ASDVS) for hospital personnel
- Court Appointed Special Advocates (CASA), a national program, involved in providing volunteers to advocate for abused and neglected children in court
- National Association of Volunteer Programs in Government (NAVPLG) for volunteer program managers working in governmental situations

There are many more. The point is, whatever path you choose, I would strongly suggest that you take advantage of any networking opportunities that may be available in your area. If budgets are tight within your agency, then it's worth your sanity to join from your own pocket if need be. Conference costs can be funded through scholarships and grants that might be available to your agency or through your own fundraising efforts for your department. Participating in any of these networking opportunities shows commitment to the profession and a willingness to accept leadership.

# Chapter Ten

## Leadership

Like it or not, your role as the volunteer program manager puts you in a position of leadership. Moreover, if you think you don't have the qualities of a natural born leader, this section will touch on some thoughts to help you unmask some of those leadership skills that are deep within each one of us. There is much written on leadership, but I thought these ideas and concepts important enough to include with the practical aspect of volunteer program management.

When one studies leadership, there are some recurring themes that seem to keep surfacing as part of the discussion. Let's look at these things.

1. **A leader has willing followers or allies.** For someone to lead there must be followers. For a good leader, the followers are willing to follow of their own free will, they are not forced to follow and there is no coercion.

**Action Tip** – Focus on gaining followers. When you are preparing to introduce a new idea or initiative, think about whom you need or who will align themselves with

your idea to support the initiative. Once those people have been identified, concentrate on gaining the support and backing of those people.

2. **Leadership is a field of interaction – a relationship between leaders and**

**followers.** How many times have you been in the situation where you see a need for better leadership. Is it leadership that you need or a different leader? Leadership is not a person, position, or program, but a relationship of interactions that occur when the leader and the follower connect.

**Action Tip** – Work at building solid work relationships with others. Your relationship with others is central to the idea of leadership. People will more likely follow you when they know you and trust you. This can be a key area in successful volunteer program management.

3. **Leadership occurs as an event.** Think in terms of a beginning, a middle, and an end. Leadership events occur as discrete interactions each time a leader and follower join together. However, leadership can appear continuous if a leader manifests multiple leadership events.

**Action Tip** – When you are introducing a new idea or concept, concentrate on the leadership event. Accept the variable duration and take initiative action when needed to gain followers and allies.

4. **Leaders use influence beyond formal authority.** Managers, like leaders, gain followers through influence. However, managerial influence and leadership influence

are quite different. A leader's influence arises from followers' interactions with him or her, while a manager's influence stems from the manager's position in the hierarchy. Leadership is person-to-person influence; management is position-to-position influence.

**Action Tip** – Develop influence beyond authority. Honesty and credibility are core elements to developing your influence. Don't promise things you can't deliver. Do take on tasks relevant to the agency's core mission. Work on gaining access to critical information networks.

**5. Leaders operate outside the boundaries of organizationally defined procedures.**

This concept clarifies that leaders operate outside the prescribed lines created by organizational rules, regulations, policies, and procedures. This opportunity exists when the agency structure does not offer certain guidance on how to proceed. I'm forever enchanted to discover that decisions are generally made in hallway conversations long before or after the meeting has taken place.

**Action Tip** – Fix your sights on nonprescribed areas. Look for opportunities and seek ways to resolve problems beyond your job description and outside the prescribed organizational boundaries set by rules, regulations, policies, and procedures.

**6. Leadership involves risk and uncertainty.** Leaders live without a safety net. The leadership arena is made up of ambiguity and chaos with the leader's task involving risk and uncertainty. That equates to performing actions in unstable circumstances.

**Action Tip** – Embrace risk and uncertainty as a challenge. A long time ago, I was told “C = O” and when you look at it, Crisis does indeed **equal Opportunity**. If you view the risk as a challenge, you will be energized and focused enough to solve the problem.

7. **Not everyone will follow a leader’s initiative.** Leaders face limits just like everyone else. Gaining followers is unpredictable. Sometimes, allies can be hard to come by. No one has a crystal ball to foretell the future. Uncertainty is always present.

**Action Tip** – Attend to those who will follow. Not everyone will always follow, so focus on those who will support your lead. Pay attention to those who acknowledge your lead as useful. Consider anyone who offers you positive support.

8. **Consciousness – information processing capacity – creates leadership.**

Leadership begins with an idea that might resolve a problem or exploit an opportunity. A leader gains followers when he or she performs an action that influences followers so they accept the leader’s direction. Consciousness – the capacity to process information – is the underlying source of leadership power.

Leaders perceive opportunities and recognize how to overcome obstacles that others do not or cannot perceive.

**Action Tip** – Develop greater self-awareness. Knowing the strengths and limitations of your consciousness and becoming aware of how you restrict or overload your information reception processes are all part of the process of being aware of oneself. Explore the assumptions and judgments you make when you interpret information.

Think about how you respond to information. Explore alternate ways to interpret data. Use different models to evaluate ideas.

9. **Leadership is a self-referral process.** Leaders and followers process information from their own subjective, internal frame of reference. Consciousness is *how* people process information. Self-referral defines *who* processes the information.

Knowledge, intelligence, experience, judgment, and wisdom are structured in the subjective state of one's consciousness.

**Action Tip** – Clarify expectations. Expectations are but one filter people use to interpret reality. What we expect is what we get. Perception is reality. Leaders must continually explore what matters to others, how they interpret events, and the meaning they assign to a situation. The reverse of that is also true. Clarify your expectations to make it easier for others to understand and accept your position.

Now that you have a basic understanding of the leadership process, please remember that the people skills you cultivate along the way will be the cornerstone to your success.

People are people first. They come with thoughts and feelings, each individual is unique and like no one else in the world. As volunteer program managers, you will be called upon to work with all kinds of different people and all types of different personalities. It requires a great deal of understanding and lots of patience to be successful as a volunteer program manager. Know too that you will not be able to keep all your volunteers happy all the time, but you should strive to do what's best for your agency and keep the majority of people happy most of the time. However, I do believe understanding and patience are

inherent requirements to a successful program. So much so, that I left an organization because management did not value the volunteers or staff as people first, but rather thought of them as pawns on a chessboard.

I'll leave you with this final piece of advice concerning the impact you will have on the people you meet, work with, and deal with. Never doubt your impact on the people who will come through your door. I recently had the opportunity to visit some of the volunteers at an agency where I was previously employed. Although five years had passed, most all of the volunteers that were there during the time I was the volunteer program manager made a point of coming up to me, thanking me for getting them started and reassuring me on what a wonderful job I had done. It was very heartwarming to me. But, it also reiterates the importance of how we deal with people, no matter how unimportant it may seem at the time.

Not long ago, the question was posed to me as to whether I thought I was a success. I immediately responded yes to the question. Here's why. I had taken a risk with a new program in which participants worked off their financial assistance each month. I had made a volunteer placement that did not work out. When I went back to the department manager and asked if she would like to try again, she responded positively (getting dirty alongside the staff paid off in this instance). So, I began the process of a second placement, being very specific in the directions and expectations with this volunteer. The second volunteer worked out quite well and returned to the agency for several months before being hired as a seasonal helper. He worked there for a few years and then made a



move to another part of the United States. Before he left, he came down to my office and thanked me. I told him he didn't have anything to thank me for, he had worked hard, proved himself, and was responsible for his own success. But he stopped me and said, "You gave me the chance." Having the luxury in life to know you are making a difference in other people's lives makes it easy for me to answer yes when asked if I am a success.

I am reminded of another example where a young man who started in the teen program when he was fourteen sent me an invitation to his high school graduation even though I had been gone from that agency for quite some time. I surface these examples to reiterate and stress the importance to you that you are dealing with people first: people's thoughts, feelings, misgivings, desires, fears, and excitement. How you handle all these things will make your mark as a good volunteer program manager. And it is a challenge that I think should not be taken lightly. Let me clarify that I am not advocating dealing with problematic volunteers – that's my next book.

# Sample Volunteer Assignment Form to Department

## MEMO

**TO:** \_\_\_\_\_

**FROM:** Your Name Here  
Director of Volunteer Services

**DATE:** \_\_\_\_\_

**SUBJ:** Volunteer Work Assignment

---

This memo will serve as notice of placement of a new volunteer. I have included a copy of the application which has basic information -- name, address, phone number, etc.

This person is \_\_\_\_\_

\_\_\_\_\_ scheduled to start work for you on  
\_\_\_\_\_

\_\_\_\_\_ awaiting contact from you to set or confirm

- a. training date
- b. starting date

Special Notes:

---

---

---

---

---

# Sample Interviewing Form

## Screening Interview

Of all the places you could pick, why choose (this agency name)?

Tell me what gives you satisfaction and enjoyment in your life.

What does the phrase “volunteering your time or service” mean to you?

Most people have a picture in their mind of what they would like to do as a volunteer,....what is your picture?

Why are you interested in pursuing volunteer activity at this time?

Discussed opportunities

What do you want to get back from your volunteer experience?

Availability preference

Orientation scheduled

Tell me your three greatest accomplishments.

Other notes:

# Sample Volunteer Position Description

## Any Agency Name Volunteer Job Profile

**Job:** Gift Shop  
**Department:** Administration

**Contact**  
Gift Shop Manager  
Administration 555-5555

**Job Location**  
XYZ Agency  
Address  
City, State, Zip

### **Qualifications**

Ability to handle confidential information in a professional manner. Operate a cash register. Excellent communication skills required. Ability to count money and balance cash drawer.  
Guest Relations: Exhibits excellent guest relations to patients, visitors, physicians and co-workers; shows courtesy, compassion and respect; conforms to the House Rules. This position requires communication and interaction with patients/families, visitors, physicians, hospital staff and other volunteers.

### **Duties**

- A. Is friendly and extends courtesies to customers at all times.
- B. Reports for duty promptly as scheduled and is familiar with items in shop.
- C. Willingness to assist with vacancies in the monthly schedule when asked.
- D. Restocks shelves, if back-up merchandise is available.
- E. Maintains log of items not in stock requested by customers.
- F. Dusts and straightens shelves as needed.
- G. Operates cash register and makes change accurately.
- H. Wraps gifts attractively as requested.
- I. Other tasks as assigned.

### **Requirements**

Minimum age: 14  
4:00 hours per shift  
Revision Date: 10/01

### **Training:**

Life experiences are augmented with mandatory orientation, infection control and on-the-job training.  
Experience working with public beneficial.

### **Special Requirements:**

**Physical Demands:** See, hear, talk, write, walk, stand, stoop, bend, squat, crouch; operate a cash register.

**Mental Demands:** Read and comprehend; comprehend, retain and follow oral and written instructions; effectively communicate; calculate and count; fill in forms.

**Environmental Conditions:** The volunteer will work inside and be protected from weather conditions but not necessarily from temperature changes; works in clean well-ventilated and lighted environment. May encounter potentially hazardous conditions due to potential exposure to patients and equipment hazards.

## Volunteer Staff Requisition Form for Special Events or Short Term Assignments

# Sample Volunteer Service Agreement Form

## ANY AGENCY NAME VOLUNTEER SERVICES

The **VOLUNTEER** agrees to:

- 1.) be friendly, courteous and helpful to visitors.
- 2.) work a determined schedule acceptable to any agency name
- 3.) become familiar with policies and procedures (written and verbal) set forth by any agency name
- 4.) be prompt and reliable in reporting for assignment.
- 5.) notify the supervisor as early as possible if unable to report or find a replacement.
- 6.) attend training sessions and undertake additional education if necessary to maintain competency.
- 7.) inform Volunteer Services of any problems encountered.
- 8.) notify Volunteer Services in writing, of resignation or leave of absence.
- 9.) understand that irregular attendance, poor performance, or failure to cooperate with any agency name policies may be interpreted as a volunteer's desire to resign.
- 10.) volunteer work will include:

Assignment \_\_\_\_\_

Time commitment \_\_\_\_\_ hours per week / month

The **STAFF SUPERVISOR** agrees to:

- 1.) provide adequate training and supervision.
- 2.) be able to discuss problems, ideas or suggestions.
- 3.) understand a volunteer's absence in an emergency.
- 4.) respect the function of the volunteer and to contribute to a smooth working relationship between staff and volunteers.

**VOLUNTEER SERVICES STAFF** agrees to:

- 1.) act as liaison between volunteers and staff.
- 2.) assist in implementation of training programs.
- 3.) be available to discuss ideas, suggestions, or problems.
- 4.) assist volunteers evaluate their assignments and make necessary changes.
- 5.) plan yearly activities for the volunteers.
- 6.) keep volunteers and staff informed throughout the year by special mailings, newsletters, etc.

I agree to the terms of this agreement.

---

Volunteer

Date

Director, Volunteer Services

# Bibliography

- Blank, Warren. *The 9 Natural Laws of Leadership*. 1995.
- DeBecker, Gavin. *The Gift of Fear*. 1999.
- Ellis, Susan. *The Volunteer Recruitment Book*. 1994.
- Ellis, Susan. *From the Top Down*. 1996.
- Graff, Linda. *Beyond Police Checks*. 1999.
- Maslow, Abraham Harold et al. *Motivation and Personality*. 1970.
- McClelland, David C. *Human Motivation*. c1985.
- McCurley, Steve. *Grapevine*. 1997
- McCurley, Steve & Rick Lynch. *Volunteer Management*. 1996
- McCurley, Steve & Sue Vineyard. *101 Tips for Volunteer Recruitment*. 1988.
- McCurley, Steve & Sue Vineyard. *Measuring Up*. 1997.
- Merrill, Mary. *Training Workshop*. 2000.
- Mundt, Richard. *Richard Mundt Seminars*. 1998.
- Scheier, Ivàn. *Building Work that Satisfies Staff as Well as Volunteers*. 1988.
- Stallings, Betty. *Resource Kit for Managers of Volunteers*. 1988.
- Stallings, Betty. *Resource Kit – The Volunteerism Project*. 1992.
- Stallings, Betty. *Building Better Skills*. 1996.
- Temme, Jim. *Team Power*. 1996.
- Tremper, Charles & Jeffrey Kahn. *Managing Legal Liability and Insurance for Corporate Volunteer Programs*. 1992.
- [www.cybervpm.com](http://www.cybervpm.com)
- Vineyard, Sue & Rick Lynch. *Secrets of Leadership*. 1991.

# The One Minute Answer to Volunteer Management Questions

This book is written to provide easy, succinct information for the new volunteer program manager who doesn't have time to delve into all the literature available and needs a "One Minute Manager" approach to volunteer program management. It provides an "easy read" for harried volunteer program managers covering topics such as:

- Community involvement
- Understanding motivation
- Recruitment
- Interviewing
- Supervision
- Recognition
- Risk management and forms usage
- Networking and
- Leadership.

Written especially for the beginner to the field of volunteer program management, this book provides a quick reference for the practical aspects of managing a volunteer program.

---

*"Continual learning is a must for volunteer managers because so many things seem to be changing around us. This book is a practical, easy to read book by an experienced professional. She offers simple, proven techniques for building and strengthening volunteer programs."*

--Mary Merrill, international consultant and trainer

---

## About the Author

Mary Kay Hood is a Director of Volunteer Services, with thirteen years in the profession. She is active with the United Way of Central Indiana, facilitating the Basic Volunteer Management Series for the last seven years. She has presented more than 20 workshops, both locally and nationally in Dallas, Chicago and Phoenix. She is an active member of her professional associations, the Association for Volunteer Administration (AVA), the Central Indiana Association of Volunteer Administration (CIAVA) and the Indiana Society of Directors of Volunteer Services (ISDVS). Additionally, she was the recipient of the Outstanding Director of Volunteer Services award from CIAVA in 1995.

