

F O

# Helping People Volunteer

Judy Rauner

O O O O

With thanks, Dr Scheier,  
for the inspiration that  
you give to me and to  
so many people.

Judy Rauner

# Helping People Volunteer

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# Helping People Volunteer

## A Workbook

There are people in any program or volunteer activity who assume responsibility for helping others to volunteer. You're one of these people if you are. . . .

- . . . a volunteer who assumes a leadership position in a service club, youth group, professional organization, cultural institution, special interest or recreation group, school, church, or synagogue.
- . . . a board or advisory council member in an organization or group that has a volunteer program.
- . . . a member of an action group or advocate for a cause who helps other people become involved.
- . . . an initiator of a grass roots volunteer movement.
- . . . a full time professional who works part time with volunteers.
- . . . a manager of a volunteer program (often titled coordinator) who may be full time or part time, paid or unpaid.
- . . . a volunteer who wants to help others in your organization volunteer more effectively; you're feeling ready to assume responsibility.
- . . . a person who plans to start a volunteer program.

If you want to learn more about how to help people volunteer effectively, this workbook is for you. You may already feel the pressure of not having enough time, even to read how to increase effectiveness. *Helping People Volunteer* is designed to be read quickly for an overview. Then the materials you particularly need can be easily located in this workbook and applied to your program.

The first section guides you toward a better understanding of your organization and volunteer program. An opinion survey aids you in determining what is already being accomplished and what needs further development. In the second section, suggestions are offered that apply management principles to your program.

The third section is for you personally. You're a person responsible for enabling others. Time management hints and ideas for finding additional resources can make your job easier.

Excellent books are available that cover in depth the management of volunteer programs. I do not attempt to duplicate these. Theory is not extensively explored. *Helping People Volunteer* provides an overview and an ongoing resource guide.

During the past decade, I've facilitated many workshops for managers from a wide variety of volunteer programs. I've learned from listening to workshop participants' concerns and from managing countless volunteer projects myself, both as a volunteer and as paid staff. Many of my associates — managers, volunteers, and trainers — have generously given input on the content and style of this workbook. Their ideas have been helpful and deeply appreciated. The end result represents much collaboration.

You and your associates can identify what your program needs are, as you work together. You have ideas and insights about your unique situation. These pages provide some direction and background material. Combine these and . . . you can help people volunteer!

Judy Rauner

# Suggestions on "How To" Use This Workbook:

1. Please read the glossary (p. 8 ) to clarify the meanings of terms used in this workbook. (For example, when I say manager, I mean You!)

2. It is advantageous to look through the entire book for an overview.

3. Then use the sections and worksheets that meet your needs. The opinion survey on p. 40 will help you decide what parts in Section II are most important to you. The Planning Process (Section II, p. 44) explains how Section I contributes to your program needs assessment.

4. In using the worksheets you can:  
Fill them out yourself

or

Involve others and increase the amount of information and insight. To involve others. . .

. . . identify the people who can help you most

. . . then invite them to work with you in a group setting

or

ask them to respond individually to the worksheets and then you compile the information.

5. *If you're a board or advisory council member*, Section I can expand your understanding of your organization's volunteer program and your own role. Then the decisions you make affecting volunteers can be based on updated knowledge and insights. If others are responsible for implementing

the volunteer program, which is probably the case unless your organization is small and you are part of a 'do everything' working board, Section II won't apply to your needs. It is important to know what is done within the volunteer program, but you'll not be doing the management.

6. *If you're just starting a volunteer program*, all sections can apply. Just put Section II worksheets in a future tense. Do be careful. Don't try to do too much. Pick out the most crucial management functions for your organization and work on those first.

Some examples of ways this workbook can be used are on page 7.

7. Volunteers offer a helping hand in many settings. To aid you in applying the worksheets to your particular program, there are examples from:



A GENERAL variety of agencies and organizations



Volunteer programs in RELIGION



SCHOOL volunteer programs



A recreation group (a square dance club, a theater group, . . .) may use only a few sections of the workbook at any one point in time. For example, one group identifies the common problem of too few people doing most of the work. In reviewing this workbook, the person(s) responsible for volunteers decides to:

Plan an orientation (Worksheet 12) for new and returning members; using "Purpose, funding, and history" (Worksheet 3) as an exercise to remind members that the group depends upon cooperation of all members to make the activities possible.

Developing job descriptions (Worksheet 10) can raise awareness of what tasks need to be done. Record keeping and evaluation (Worksheets 16 & 18) may be used to provide continuity and resources for leadership changes. Then the next year, additional sections of the workbook can respond to other management needs.



A fundraising chairperson may use this workbook in a more limited way, especially in a church or synagogue that already responds to both program and volunteer needs. He or she could, for example, utilize "Job Development," (Worksheet 10) to open communication among short term volunteers who are assuming leadership. When even the simplest tasks are clarified, everyone can understand their roles.

"Orientation" (Worksheet 12) could be given to each sub-committee leader to use with the volunteers in his/her area of responsibility.

Use of the evaluation and record keeping worksheets would maintain continuity for next year's fundraising committee.



Teachers won't necessarily take time to review the entire workbook, but may use:

the evaluation worksheet (17) as an overview.

The Job Description worksheet (10) enables the teacher to think through what expectations he or she has for an aide in his/her classroom.

The simple negotiation of teacher/teacher aide responsibilities on the Supervision worksheet (15) is a practical exercise.

Where there are large numbers of volunteers and a full time program manager in a hospital volunteer program:

Section I can be used as an update. An expansive program is clearly influenced by what's happening in volunteering (Worksheet 2), the institution and the people involved (Worksheet 4), and the management style of the program director. The survey, "Where are we right now?" (Worksheet 8) enables those involved to determine which Section II worksheets are needed.

Section II, Planning (Worksheet 9) encourages paid staff and volunteers to plan together. If interview and Placement (Worksheet 13) is identified as needing immediate attention, that is an initial planning task. All management functions (Worksheets 10-19) are potentially useful in a large program.

Sections III and IV can provide ideas to the volunteer program manager on time management and expanding community resources, possibly in a jointly sponsored program with other hospital volunteer directors.

The pastor or rabbi, as primary leader in a church or synagogue, could utilize every section of this workbook, either himself/herself or by referring materials to others who manage volunteer program components.

Worksheets in Section I guide a volunteer program needs assessment that can be accomplished quickly. Making time to examine the purpose of volunteer involvement (Worksheet 3) provides a valuable opportunity for the spiritual leader to set direction and focus on the vision that brings people together.

The pastor/rabbi's participation in planning for volunteers is a witness of commitment to the programs and to the volunteers. Then implementation is simplified for each separate program because effort is made to prevent problems. (And what pastor or rabbi won't appreciate having fewer problems to negotiate!)

The volunteer coordinator, community aide, or whomever is responsible for the overall school volunteer program can utilize most sections of this workbook.

In planning, the principal, staff, and volunteers give their input by using "Where are we right now?" (Worksheet 8) or the shorter form evaluations (Worksheets 17 & 18).

For staff inservice, using "Why Have Volunteers" (Worksheet 1) acknowledges and validates disadvantages staff feel that they have and moves toward an emphasis on advantages.

All worksheets in Section II are applicable.

Volunteers can be offered Worksheets 5 and 18 to say we care "Why you volunteer" and want your evaluation of how well the program runs.

# A Glossary

(Or what I mean when I say. . .)

**Citizen Participation** is one of the government's terms for volunteer programs.

**Manager**, leader, coordinator, director all are terms used for those people who assume responsibility for a volunteer program being developed and maintained. The term manager is used in this workbook.

**Management Team** refers to those people, paid and unpaid, who assist and support the volunteer program manager by planning and implementing volunteer management functions.

**Management Functions** are the activities or actions that enable the volunteer to accomplish his/her job. These are: needs assessment, planning, job development, recruitment, orientation, interview and placement, training, supervision, record keeping, evaluation, and recognition.

**Organization**, agency, church or synagogue, group, or school all describe structures within which people volunteer. I most often refer to 'organization', but the information applies to your program base, whatever term describes it.

**Volunteer Programs** can be found in agencies, churches, groups, schools, and organizations of all sizes with varied levels of sophistication. This workbook is directed mainly toward people working where there is a program or a "plan or system under which action may be taken toward a goal."<sup>1</sup> While this definition indicates there is some structure, the materials in this workbook also apply to informal, minimally structured volunteer activities.

**Volunteer** — anyone who gives his or her time and talents by choice and without monetary reward. This includes people who are given enabling funds (reimbursed transportation expenses, etc.), students who volunteer for class credit, and people who choose to volunteer as an alternative sentence in a court of law (court referral program). These people still choose to give their time and talent.

Section 1

# Helping People Volunteer

Questions to Ask

# Section I

## WHY HAVE VOLUNTEERS

If your organization or group consists only of volunteers, the basic answer to this question is easy. Without the volunteers, the organization or group wouldn't exist. Volunteer involvement also can contribute to the goals of an organization or group that could function without a volunteer program. For example, hospitals certainly could exist without volunteers, though some patient services wouldn't be available unless people donated their time.

Lists of advantages and disadvantages to having volunteer involvement are provided on page 11. Which of these exist for your volunteer program? You'll think of others . . . just add them.

These advantages and disadvantages explore a very basic issue. Do the advantages outweigh the disadvantages? If the advantages aren't of greater value, effective management may not be what is needed. Instead, perhaps there shouldn't be volunteer involvement at all.

Both the positive and negative points about having volunteer involvement need to be acknowledged. The positive factors make it worthwhile to spend energy on effective management. Some negatives can be altered by good planning and management; others cannot, and must be viewed realistically.

Perhaps there have been complaints about having volunteers in your organization. Reviewing the advantages may remind those who feel burdened just how important

volunteers are. If everyone is committed to and excited about having volunteers, it is not necessary to spend much time on this question.

Throughout this workbook, the managers of volunteers are encouraged to share their responsibility with others — program supervisors, program staff, volunteers, and those receiving benefits from the program. Now is a good time to start.

Here are some suggestions on how you might explore this question:

Invite others to look at the list on page 11, discuss which items affect your program, and identify which are most important in your organization. This could be done informally over a cup of coffee or as a meeting agenda item in a more structured setting.

or

At a meeting, invite people to brainstorm the advantages and disadvantages of having volunteers, then discuss the value of each issue named, deciding which have priority influence. Keep the list to use as a reference after brainstorming.

or

Start a bulletin board poster with a few thoughts about why your organization or group has volunteers. Invite people to share their thoughts by adding their ideas to the poster.

or

Design an activity especially for your group.

# Worksheet #1

## Why Have Volunteers?

Goal: to identify advantages and disadvantages of having volunteer involvement.

Suggestions: Check the points that apply to your program. Add your own. Questions at the bottom of the page can be used as discussion starters.

### ADVANTAGES

- \_\_\_ Volunteers enable expanded services to be offered.
  - \_\_\_ Response to individual needs is possible.
  - \_\_\_ Money is raised for the organization.
  - \_\_\_ Issues and people are given support.
  - \_\_\_ Volunteers are informed about the community, the organization, and the needs that exist.
  - \_\_\_ Volunteers contribute to general community (church/synagogue, school) needs.
  - \_\_\_ Volunteers share their knowledge and experience to benefit the organization.
  - \_\_\_ A greater amount of time, talent, 'person power' is available.
  - \_\_\_ Volunteers receive benefits for themselves, by helping others and meeting their own needs.
  - \_\_\_ Social and recreational opportunities are made available in the community (church/synagogue, school)
  - \_\_\_ Our purpose and goals are explained by volunteers — good public relations.
  - \_\_\_ Funding source requirements are partially met by having volunteer involvement
- or
- Need for donated funds is understood.

### DISADVANTAGES

- \_\_\_ Time and energy are required of the manager and other staff to involve volunteers. (training, supervision, etc.)
- \_\_\_ The same people always do all the work and 'burn out'.
- \_\_\_ Volunteers' expectations aren't always met.
- \_\_\_ Program quality suffers if volunteer jobs aren't done well.
- \_\_\_ Paid personnel are uncomfortable and/or threatened by volunteer involvement.
- \_\_\_ Volunteer commitments are often short term and there is constant turnover.
- \_\_\_ Paid staff are more accountable — it's hard to fire volunteers.
- \_\_\_ Volunteers terminate their commitment if unexpected personal needs arise.
- \_\_\_ Legal requirements of 'unofficial' personnel mean added liability coverage needed.
- \_\_\_ Volunteers may expect to be hired when paid positions open up.
- \_\_\_ A variety of duties are required, not just busy work.
- \_\_\_ With more people involved, there are more interpersonal relationships to consider.

Are there enough advantages to make having volunteers worthwhile?

Can any of the disadvantages be relieved by changing ways the volunteer program is managed?

# What Factors Influence Your Volunteer Program?

No one disputes the fact that our society is changing rapidly. Some of the changes directly influence volunteering in the United States. There are also influences unique to your program: the community where you live, the organization itself, and the people involved. Each of these will be addressed as you prepare to answer, "What factors influence our volunteer program?"

## **CHANGES IN VOLUNTEERING NATIONALLY**

Volunteer activity is viewed by many as declining. Actually, more people are giving their time than in the past and they come from more varied backgrounds. A 1974 Census Bureau survey commissioned by ACTION, the U.S. Agency for Volunteer Service, determined that one out of four Americans over the age of 13 did some form of volunteer work that year. In other words, nearly 37 million Americans gave time, energy, and effort as 'helping people' serving specific causes in 1974. An update survey of the nature and scope of volunteering is pending; all indications point to increased numbers.

There are many reasons why the numbers of volunteers are growing. "The steady increase in the amount of discretionary time available to people means that there will be a vast increase in the amount of volunteer time available and in the variety of persons potentially available as volunteers."<sup>2</sup> This is one of many changes cited in

*The Volunteer Community*, by Eva Schindler-Rainman and Ron Lippitt. Both private and public employers are encouraging their employees to donate volunteer services. People are retiring earlier and living longer, so retirees have more time to give. Young people see volunteer work as career exploration and a positive way to express their idealism. Groups seeking change organize volunteer projects in sections of the population where formalized volunteering isn't a tradition. These include neighborhood organizing and ethnic action groups. In *Volunteering 1979-80*, a renewed dimension in volunteering is identified. "Ad hoc volunteering . . . (such as) the efforts of citizens to integrate Vietnamese refugees into countless communities — clearly was on the upswing."<sup>3</sup>

In the past, the traditional volunteer was the married woman whose husband's income sustained the household. This is changing as women today explore other options, such as a return to school or work. In addition, the number of women who are heads of households is increasing. Now when women choose to volunteer, they generally expect their experience to offer some potential for personal growth.

In our society, mobility continues to grow. This influences volunteer turnover through shorter term commitments. But a move from the community is not the only expression of mobility. Now people feel freer to determine if and where they wish to express their tal-

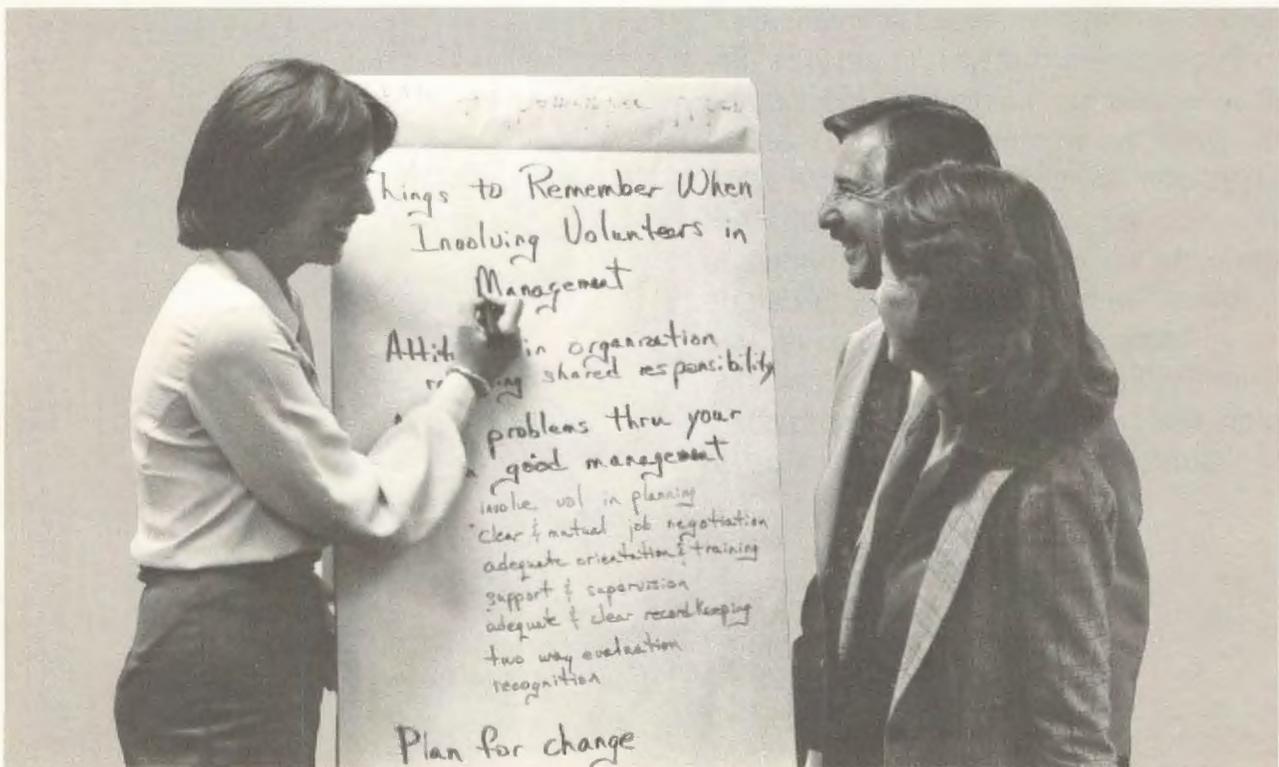
ents. If only long term commitments are possible in your program, some potential volunteers are lost.

Government influences volunteering. Government programs utilize volunteers. Through the office of ACTION, enabling funds cover expenses for Peace Corps volunteers, Volunteers in Service to America (VISTA), Retired Seniors Volunteer Program (RSVP), and other projects. ACTION also offers support services to existing private sector volunteer structures. Federal funds support many community based human care service programs, and generally the funding requirements include citizen input on advisory councils and in direct service.

Management of volunteer programs is a growing professional field. Many organizations now pay staff to assume responsibility for their volunteer programs. Program directors who work with volunteers are hired by churches and synagogues. Auxiliary staff in schools also manage volunteer pro-

grams as part or all of their job responsibilities. Much time and energy is involved in meeting program needs and volunteer needs. The issue of continuity arises when a volunteer fills the primary management role. In a sizable program, a full-time management position still doesn't allow enough time to accomplish all potential program needs. A paid staff member is in a strong position to represent volunteer program needs to other paid personnel and to the general (church/synagogue, school) community.

**VOLUNTEER:** The National Center for Citizen Involvement is a national organization that supports this growing professionalism. It is dedicated "to stimulating and strengthening voluntary action and volunteer involvement — those traditions through which responsible citizens, individually and collectively, in neighborhood and nation, seek to build a free society."<sup>4</sup> This organization offers training events for volunteer program managers, plus such



services as public policy and national affairs advocacy for volunteers, resource information, and development of special projects.

Many people feel renewed hope for the democratic process as members of boards and advisory councils. These advocacy volunteers actively support a cause. They want to help make a difference and to see change. Fewer board and advisory council members are content today to be rubber stamps for someone else's decisions. They understand the necessity of accountability and want to experience an authentic decision making process. Management and board members need to jointly agree on a process for meaningful involvement. Advocacy volunteering is increasing in grass roots organizations: consumer groups, neighborhood councils, and political action groups. Changes are occurring in the ways public policy is shaped and implemented. During the 70's, the numbers of advisory and policy making groups in schools and religious settings increased dramatically.

Economics today affect paid jobs. Social service funding is limited. Unions and employees are watching carefully that volunteers don't assume tasks that were previously accomplished by paid staff. Acknowledge this challenge. It is important to collaborate with paid personnel to decide how volunteers can best supplement the services offered by paid staff. Economic factors also reinforce the need for organizations and groups to collaborate; to

strengthen programs and achieve common goals. Collaboration can conserve resources (people, time, money . . .) by avoiding unnecessary duplication of effort.

There are more volunteers, but there are also increased opportunities to volunteer. Think of your own community and the number of organizations and groups that utilize volunteer service . . . churches, schools, recreation groups, hospitals, self help groups, service agencies, political groups, cultural organizations, and many others. The programs that are well managed appeal to a prospective volunteer. Getting started and staying involved is more pleasant when there isn't disorganization.

Volunteer involvement has a unique place in our history. America was founded on a tradition of people helping one another. Volunteering today has changed because our country has changed, but the basic commitment is the same. We will need to respond to future changes.

# Worksheet # 2

## Community Changes

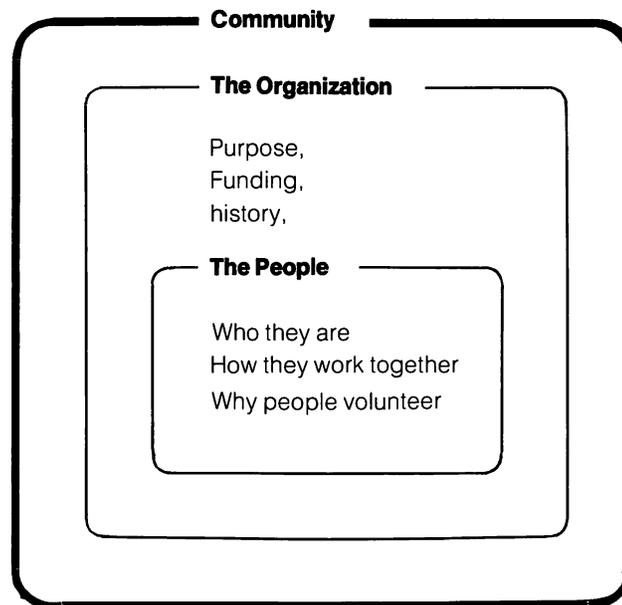
Goal: To determine changes in our community's volunteer sector, how our program is influenced, and what actions we might take as response to changes.

Suggestions: Discuss questions 1 & 2 in a group or invite individuals to respond. Then, discuss only the changes that influence your program when answering questions 3 & 4.

Changes nationally	1. Does this change exist in our community?	2. How does this influence our program?	3. What possible actions respond to these changes? (add)	4. How can this be done in our organization?
More volunteers (from wider variety of ages and backgrounds)			Examine attitudes- are our expectations positive?	
Women exploring more options			Expand recruitment approach	
Mobility - in residence & in individual commitment			More flexible jobs Shorter term commitments	
Government influences			Know what's happening and how it influences	
More professional volunteer program management			Better managed programs based on both program and volunteer needs	
Advocacy volunteering increases (boards, advisory councils, action groups)			Meaningful opportunity (not rubber stamp)	
Economic limitations: <sup>1</sup> Concern that volunteers may assume paid staff tasks <sup>2</sup> Funding sources tight			Carefully collaborate: <sup>1</sup> with paid staff to define volunteer positions <sup>2</sup> with other organizations, groups	
Greater competition for volunteers			Offer interesting volunteer options	
Other changes we've observed in our community				

# What Factors Influence Your Volunteer Program?

## Your Program Is Unique



### Purpose of the Organization

The purpose of the organization or group, the reason for its existence, directly influences the volunteer program. People choose to be involved in activities and places that appeal to them and reflect their own values and interests.

Why does your organization exist? The response to that question is often a scoffing, "Everyone here knows that!" It's easy to assume that the reason for existence (mission or purpose) is understood and agreed upon. In reality, it's seldom discussed. The mission or purpose tells who is served and in general terms what is offered, and should not be confused with specific goals.

An equally important question is, "What is the purpose or mission of the volunteer

program?" Why, in general terms, does the organization have a volunteer program. Volunteer involvement must relate to the overall purpose of the organization, as seen by the people who choose to work in the program. If these purposes don't mesh, the volunteers may feel disillusioned. The image of why an organization exists draws people to it. If the organization is different than originally envisioned, the volunteer may leave.

When the purpose of the organization and of the volunteer program is not agreed upon by the people involved or affected, public relations efforts and improved communication are advisable. Individuals may never completely agree upon their visions of purpose, but healthy progress can be made when the differences are acknowledged.

These examples show how the organization and volunteer program purposes relate:



The Crisis Center purpose: To provide short term crisis intervention and counseling service.

The volunteer program purpose: To provide students an opportunity to do volunteer crisis counseling while experiencing personal growth and career exploration.



The church/synagogue purpose might be defined as bringing people closer to God within a community setting.

The volunteer program provides opportunity to personally grow in commitment and contribute to the community.



The school purpose could be defined as providing the best possible educational opportunity for each individual child.

The volunteer program supplements the best possible education for children.

These potential problems might occur when the volunteer program purpose is perceived as different than the stated purpose:

Clients may fear that student volunteers are unprofessional, unprepared staff extension — it's important to clarify amount of volunteer training & supervision.

"Why are we here" can be an emotional issue. People who feel strongly they're there 'to serve', 'to worship', to learn', may invalidate others reasons and ways of volunteering.

Often specific goals are perceived as purpose; one person wants a 'back to basics', another more arts, another discipline — so miss the common focus on what's best for the individual child.

## The Funding\$\$\$\$\$\$

Funding for recreation activities, human care service agencies, professional organizations, cultural interest groups, youth programs, etc., is seldom adequate to do everything needed or desired. It does cost money to make things happen. Yes, even volunteers cost, though not directly through salaries.

Costs that specifically relate to the volunteer program may include: paid staff who assume management responsibility, office space for the person or persons responsible for management of the volunteer program, a place provided for volunteers to put their belongings and have coffee, cost of training the volunteers and the staff working with them, supervisory time provided by paid staff, and other management costs such as office equipment and supplies, printing, and mailing.

The issue of paid vs. nonpaid management of volunteer programs is not new or simple. The value of the volunteer program is significant to the organization and a person should be specifically designated to assume the program's management responsibilities. Decisions regarding whether the designated manager should be paid or unpaid, full time or part time depend upon several factors:

*The administration's value and understanding of volunteer program management:* Is there a commitment?

*Amount of time to be devoted to volunteers:* (to some extent this depends upon the size of the program).

*Degree of accountability of the volunteer program manager:* How much is the program dependent upon volunteers? What are the expectations of funding sources?

*Need for credibility among other staff and in the community:* Will a paid person be able to represent the program more effectively?

*Continuity of the program:* It's unlikely that an unpaid person will make a long term commitment.

Funding for effective volunteer management is an investment in people, the unpaid personnel.

Funding sources include membership fees, grants, donations, and subsidies. All have common components. The people who provide the money will want to know how it is used and will have some funding requirements. You must be aware of what is expected of the volunteer program by those who provide funds.



## Funding Sources



*Crisis Center*

Grant — terms include community citizen involvement (board or advisory council)

Membership drive



Fees for religion classes

Donations



Taxes

Annual carnival

## Their Influence on the Volunteer Program

Locate and involve citizens — if their experience is meaningful, the program gains input & board members stay active.

Membership is voluntary so potential members and active volunteers question what the organization offers to the community and to them.

Some feeling exists of "We're paid so its not necessary to volunteer-"

Donors expect to see budget and have policy input as board or council member.

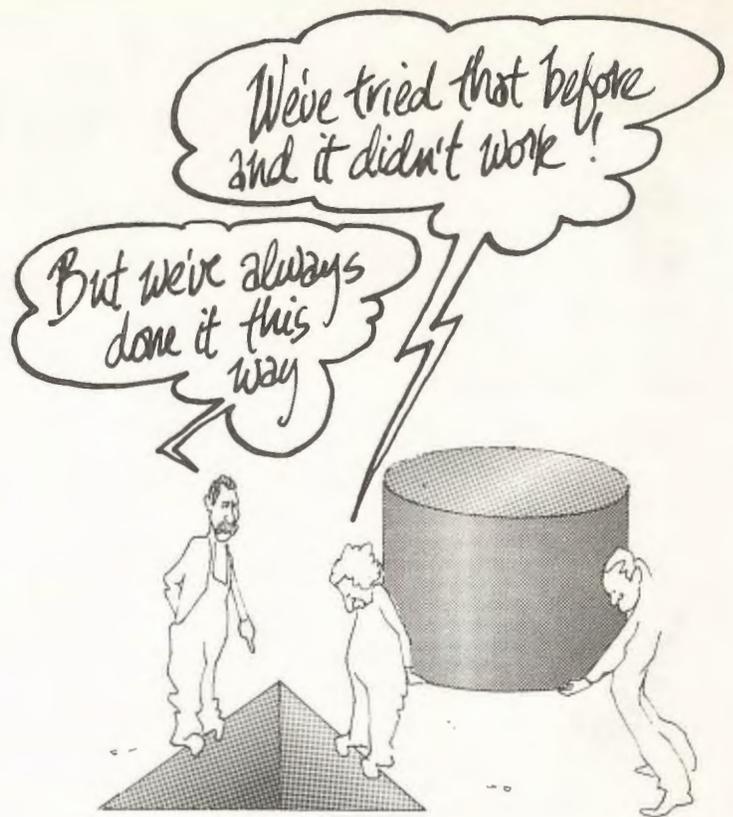
High expectations — volunteers are also taxpayers and feel some ownership.

Much energy is expended by volunteers and they will want to know the amount of money raised and how the money is spent.

## The History

History does not have to repeat itself, but look at the history of your volunteer program. The past can emerge and affect what happens now. Consider the length of time volunteers have been actively involved. This contributes to the program's sophistication and maturity. The reasons the program was initiated and by whom are strong influences. If the purpose of the organization has changed, it is important to determine whether the purpose of the volunteer program has changed with it. The volunteer's openness to change varies according to past positive and negative experiences in the program.

The most effective way to deal with history is to recognize its potential importance and consider it in your planning and management.



The impact of history can emerge in any setting:



Teachers are unaccustomed to having anyone else in the classroom, so feel uncomfortable about the idea of working with volunteers. By respecting the history, teachers who are ready to model having volunteers are the ones to demonstrate positive change.

Volunteer programs aren't new . . . just expanded and different as programs were added. PTA, for example, has a long history of volunteer support to the school and deserves to be acknowledged for the past as well as involvement in the future.



The program started as a grass roots project. As it grew, staff was added. The initiators have historical pride in their past role and need to be involved in changes.

A solidly financed federal program has been established in the community that meets the need for daytime referral, not emergency, that meets community needs. This was an original goal that is no longer necessary.



One group always had responsibility for a special end of the year project, but membership is dwindling. The project is important, but losing its impact because the group isn't responsive to changing community interests.

Changes of leadership cause unrest. The community goes through a mourning period for the pastor or rabbi who leaves and resists any changes, especially in worship, until some time has passed.

# Worksheet # 3

## Purpose, Funding, History

Goal: To clarify background information on: Our Organization — Purpose, Funding, History

Suggestions:

- 1) Compare the written organization purpose to the purpose as perceived by those involved and people in the community. Ask for input formally at a meeting, through a written survey, informally over coffee, or. . .)
- 2) Funding — List all the funding sources, then evaluate how each influences the volunteer program.
- 3) Research the questions on the 'History Quiz'.

1. The PURPOSE of our organization is:

As officially  
stated:

As perceived by  
those involved:

As perceived by  
the community:

The PURPOSE of the volunteer program is:

As officially  
stated:

As perceived by  
those involved:

As perceived by  
the community:

Is there common vision?

What are the disparities?

2. FUNDING SOURCES ARE \$\$\$\$ INFLUENCES ON THE VOLUNTEER PROGRAM ARE:

- 1.
- 2.
- 3.
- 4.

3. A HISTORY QUIZ

How and why did volunteers first become involved? The involvement was initiated by whom?

Have the purpose and goals of the organization changed from when first started?

How has volunteer involvement changed over the years?

Who has vested interest in the volunteer program — past or present?

# Who Are the People Involved With Our Volunteer Program?

There are people who volunteer and people who receive services or benefits. Depending upon the size and nature of the program, there may be paid personnel. The functions people perform within a program include making policy, managing, giving direct service, fund raising, and providing support. Sometimes the same people perform several different functions. Individuals are often indirectly involved or involved only part time with the volunteer program. It may be helpful to keep in mind the degree of involvement each person or group of people has.

*Policy makers* are those who make the decisions regarding organization or group existence, planning and direction, hiring and firing the executive director. An incorporated board is legally liable. Advisory committees make decisions on what ideas and suggestions to give the board. They do not make final decisions, unless given that responsibility by the board, and are not liable.

The *management* or administrative roles are filled by those who are responsible for planning, organizing, staffing, directing, and controlling the program activities. The program manager also works with and supports volunteers who make policy and do fund raising. These may include paid positions.

*Direct service* to clients or program participants can be performed by either paid staff, volunteer staff, or a combination

of the two.

*Fund raising* includes that which is done for the volunteer program and for any general fund raising in the organization.

*Support* functions, as part of the volunteer program, are those activities that keep the program going, such as office work, record keeping, maintenance of the building or facilities used. These tasks don't necessarily involve personal interaction with those receiving benefits.

Those who directly receive benefits from the volunteer program include:

- People who need or want the services offered and choose to receive the service.
- Staff who are given support in their jobs by volunteers, thereby being freed to do what only they can accomplish because of special training, job definition, legal or organization requirements.
- Volunteers who meet their own needs while helping others.

Those who indirectly receive benefits from the volunteer program include:

- Families of those involved in the program.
- The community when the program responds to general community need or prevents problems.

# Worksheet # 4

## People Involved With Our Volunteer Program

Goal: To compile an overview of people involved with our volunteer program

Suggestions: Depending upon the numbers of people involved, you may choose to record only numbers, all names, or a combination of numbers and names.

VOLUNTEERS

PAID STAFF

Policy making boards,  
advisory committees

Administrative/management

Direct service

Fund raising

Support

WHO ARE THE PEOPLE RECEIVING  
benefits?

Indirectly

Directly

Within the organization

In the community

Branch library volunteer program examples — People in our program



	Volunteers	Paid
Policy/Advisory	*Board of Library Commissioners	*City Council
Administrative/Management	*Executive Council - Friends of the Library	Librarian
Direct Service	Storyteller (1) Special program volunteers Junior Women's Club - refreshments, special programs	*Volunteer Coordinator Assistant librarian
Fund Raising	*Friends of the Library (Book Sales, etc.)	
Support	Clerical assistants (4) Students (3) Make bookmarks	*These people responsive to all branch libraries



Policy/Advisory	Trustees (12) Administrative Board (60)	
Administrative/Management	Education, Worship, Finance, Mission Committee chairpersons (members of Board)	Senior Minister Associate Minister Choir director/organist
Direct Service	Sunday School teachers (22) Choir Members (15) Membership care - home visitors	Director of Christian Education
Fund Raising	Women's Fellowship Special Events (dinner, sales) Stewardship committee	
Support	Gardeners (4) Altar Guild (14) Office assistants (7)	Secretary (2) Maintenance (2)



Policy/Advisory	School Advisory Council (8)	Principal 2 Teacher representatives
Administrative/Management	PTA Executive Committee	Principal Volunteer Coordinator (part-time)
Direct Service	Teachers Aides (26) Library Aides (7) Volunteers in Education (14 - give 1 presentation)	Teachers (12) Counselor (part-time) (1)
Fund Raising	Bazaar Committee (34) PTA	
Support	Craft Workshop Newsletter typists (2)	Secretary Maintenance

# How Do the People Work Together?

Depending upon the organizational structure, paid and unpaid personnel may perform the same functions. The important things are that everyone understands who is responsible for what and accountable to whom. If everyone involved in the program understands how communication takes place, many misunderstandings are avoided.

An organization chart, if it exists, may or may not reflect how people really work together. Both the formal (an official chart) and informal (what really happens) work relationships are important to explore. Here are some sample 'pictures' of how people might interact.

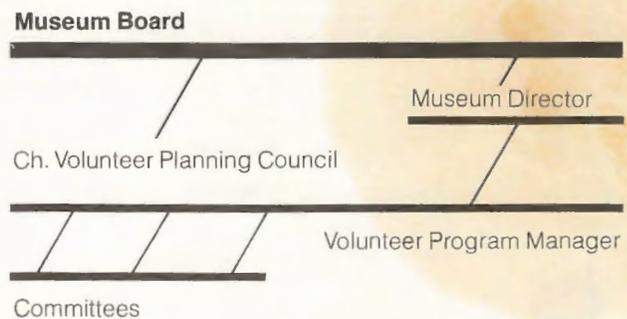
## How Do the People in Your Organization Work Together?

Ask others to help you visually draw a picture of how people interact in your organization. This may clarify for you and for others how people work together. The end result isn't as important as the process of talking about the ways in which people understand these interrelationships. A chart by itself could be misunderstood or restrictive. This exercise helps identify who has information, resources, and responsibility.

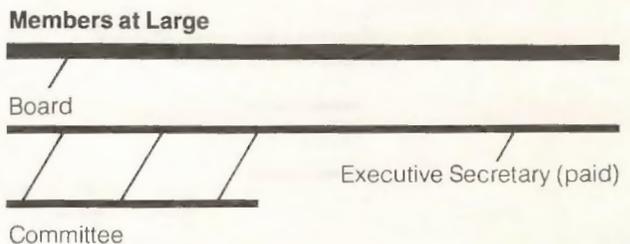
Another exercise that helps people clarify their expectations and roles involves asking one another "What do you expect of me?"



A museum has a planning council for the volunteer program. The council chairperson is on the museum board. There is one paid volunteer program manager, accountable to the museum director.



An organization of people working in the same profession (an arts consortium, agricultural organization, medical paraprofessional) has one paid staff position, an executive secretary. Each committee is headed by a board member.

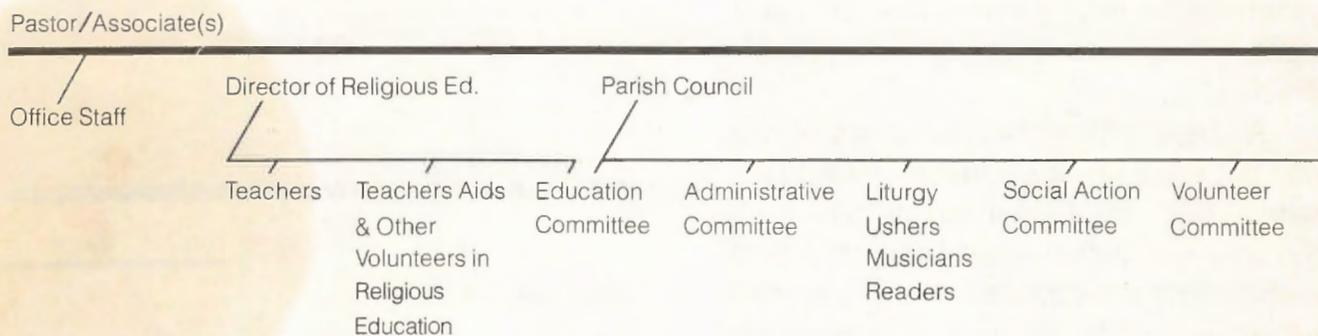




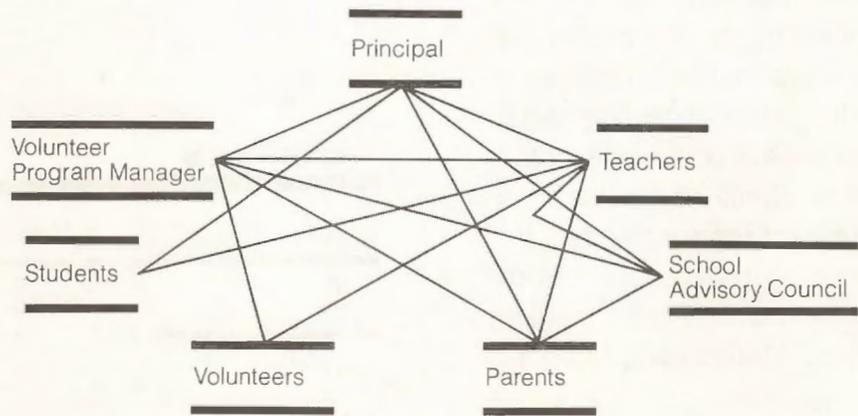
How Do the People Work Together?

The chairperson of a volunteer committee is on the parish council. This chairperson meets with the chairpersons of all other volunteer based programs, the pastor, and the paid director of religious education. Meetings take place in the spring for volunteer program planning, fall for coordinating implementation, and January for joint volunteer inservice and building community. The volunteer chairperson is responsible for coordinating volunteer information and records, initiating overall recruitment and evaluation.

### Church



The volunteer program manager is accountable to the principal, has direct contact with teachers and volunteers, informal contact with other parents and students. The v.p.m. attends school advisory council meetings as a non-voting resource person.



# Why Do Volunteers Choose a Particular Position or Task?

People are bombarded with articles, books, and ideas on how to better understand themselves and their needs. It's becoming acceptable to have needs and plan to meet them, even while helping others. First, volunteers choose to work in an organization that appeals to them. During interviewing, an additional and more specific decision is made. There are reasons or motivations that influence job choice, and not all are conscious ones.

Possible motivations are explored by the volunteer program manager when listening to the volunteer's interests and ideas. Volunteers can also become aware of their own general motivations through a structured activity, one option being the worksheet, "Why I Volunteer," on p. 29. If a volunteer uses this, review it with him or her and consider his or her needs during placement. The worksheet is based on the following motivations and the number refers to the corresponding worksheet statement.

Achievement (desiring self advancement and growth)	1
Challenge (handling difficult or complex work)	2
Creativity (contributing new ideas with originality and inventiveness)	3
Independence (being on one's own, free from supervision)	4
Interest (seeking stimulating activity)	5
Leadership (planning, organizing, and directing others)	6

Recognition (being respected, having prestige, and receiving approval)	7
Security (wanting familiar and comfortable tasks)	8
Self expression (using natural talent or ability)	9
Service (helping others, responding to community needs and to personal values)	10
Socialization (being with others, making contacts, expanding circle of acquaintances)	11
Variety (seeking diverse activity, change of scene or tasks)	12
Sense of duty (feeling task won't be accomplished 'without me')	13

The exercise, "Why I Volunteer" is designed to increase the volunteer's awareness of his/her motivations. These motivations may change periodically. Keep in mind that a person's reasons for volunteering are valid unless they conflict with program values or goals.

A person with varied motivations may check many items. In this case, those items not checked may indicate what positions should be avoided.

You may or may not want to identify the volunteer's checked statements in "Why I Volunteer" as being specific motivations when discussing interests or reasons for wanting to volunteer. You can decide what will be meaningful and helpful to the volunteer.

Don't underestimate that "sense of duty". It keeps some programs going. Some tasks aren't going to be personally satisfying and still have to be done. I don't enjoy driving young soccer players to practice, particularly since our son is the 4th child and I often feel like a full time taxi driver. But I do know he can't play soccer unless all the parents help. So . . . it is sense of duty, desire for the program to exist, and NOISY!

When people volunteer, they make choices. Helping volunteers make choices that are good for them is also good for your program.

No one can prejudge what another person's reason is for volunteering or NOT volunteering. A person may have circumstances or limitations that make it impossible to volunteer. One judgment I've heard about those who don't volunteer is, "They don't care". Such statements move people into camps of 'them' and 'us' and are destructive to good public relations.

There is a delicate balance between letting potential volunteers know they're really needed without making them feel guilty if they don't volunteer.

If a program mandates shared responsibility and people agree to that when they participate in the program, then giving time isn't an option. Their motivation includes being eligible to participate in the program, such as a neighborhood alert or parent cooperative program.

Marlene Wilson, in her book *The Effective Management of Volunteer Programs*, states "One of the first things we must be aware of is the necessity to distinguish between a person's ability to do something and his will to do it. A volunteer might be perfectly able to perform a task, but they simply do not want to do it." And "Sometimes it is easy to equate our need for a particular skill with a person's willingness to perform it, without ever bothering to check out that assumption with the person."<sup>5</sup>

Volunteer interests and motivations need to be considered when developing job descriptions. There should be a variety of jobs that meet diversified needs. Motivations or reasons that people volunteer influence every management area; how volunteers are recruited, oriented, trained, recognised, etc. Response to motivations shows concern for the individual volunteer.



# Worksheet # 5

## Why I Volunteer

Goal: For volunteers to explore why particular volunteer tasks or positions are chosen and what to seek for volunteer satisfaction.

Suggestions: Check the statements that strongly reflect your present feelings. Add your own if its not already listed. Then indicate the three strongest motivations, in order of importance.

When I VOLUNTEER. . .

- 1. Career exploration, work experience, maintaining skills, or school credit are important to me.
- 2. Challenging situations stimulate me.
- 3. Jobs that utilize my originality and creativity appeal to me.
- 4. I like to work independently, without close supervision.
- 5. It is important that my position corresponds to my personal interests.
- 6. I like to plan, organize, and direct activities as a leader.
- 7. I want approval, respect, and appreciation from others.
- 8. Familiar, comfortable activities are my choice.
- 9. Using my talents and abilities is a form of self expression.
- 10. I value giving service to other people and to the community, (school, church/synagogue.)
- 11. I enjoy being with people and expanding my circle of acquaintances.
- 12. I enjoy a variety of tasks and a change of scene.
- 13. I feel no one else will do the job and/or I'd feel guilty if I didn't.
- 14. \_\_\_\_\_

# Your Community

Every community is unique and it is important to understand just how your community influences your volunteer program. Seeing only your program without taking time to explore the 'big picture' limits vision and can hamper potential effectiveness.

Sometimes the most obvious factors are overlooked; for example, the high percentage of rental properties in an area of high mobility. Often when high mobility exists, there are complaints about the shortage of volunteers and the problem of turnover. Concurrently, the 'short term' residents aren't actively sought as volunteers. When you know your community, you can plan more realistically. The people who can only make short term commitments can be part of a successful program. Volunteers are given opportunities to be involved in the new community, meet people, and make a contribution. The program benefits by having more volunteers and people with real understanding of the challenges that accompany frequent moves. Military bases know that their people are on the move. They plan for short term commitments and have very effective volunteer involvement.

Some benefits of knowing your own community include the possibility of collaboration, both in offering better services and in sharing with others who are interested in the same thing. It is discouraging and detrimental to your organization if a program fails because it duplicates an existing service. So pitfalls can be avoided, too, by researching your community.

How do you find information? Resources include official records (census data and government agencies research), the library, the Chamber of Commerce, local planning groups, large umbrella human care service organizations like United Way, and coalition groups. Invite other people in your organization to share their knowledge and understanding.

Worksheet 6, COMMUNITY, outlines characteristics that give a community its unique identity. Answering the following questions aids you in determining how your volunteer program is affected.

Population - Are there language barriers or cultural expectations to consider? Does population shift influence long range plans?

Economics - Who is unemployed? Are many women working?

Mobility - Are people hesitant to make commitments or willing to make only short term commitments?

Transportation - Are car pools needed? Are more neighborhood based services advisable? Would reimbursement for gas mileage enable people to volunteer?

Weather - Are volunteers unwilling or unable to participate some seasons?

Political Structure - Who has the power? Who can help you?

Existing Community Services - Do we avoid duplication of existing resources?

Community Needs - Do we respond to current needs? Are we willing to alter our goals to respond to unmet or new community needs?

# Worksheet # 6

## How Our Community Influences Our Program

**Goal:** To consider how our community influences our organization and our volunteer program.

**Suggestions:** Consider each category. If the information doesn't apply to your program, check the first column, 'info not relevant'. If you feel a category does influence your program, obtain general facts that can help you in future planning. The questions may guide your decisions about how much influence exists.

CHARACTERISTICS OF OUR COMMUNITY	INFO NOT RELEVANT	INFORMATION IMPORTANT (Record & include info sources)
Rural/urban/suburban		
<i>Population</i>		
% of youth, senior, ethnic groups		
Family structure (single parent, nuclear family)		
Amount of population shift		
<i>Economics</i>		
Employment rate, cost of living, tax base, type of industry		
Current national economy		
<i>Mobility</i> of total community and of our program participants — % military, % rental vs. owner occupied homes, migrant workers, seasonal population changes.		
<i>Education</i>		
Level of education of community & of program participants		
Community education system		
<i>Transportation</i>		
Public transportation availability		
Fuel shortages		
<i>Weather</i>		
Changeable or consistent		
<i>Political Structure</i>		
Funding for human care services		
Attitudes of current governing body		
<i>Existing Community Services and Resources</i>		
Recreation, health care, public safety, housing		
<i>Community Needs</i>		
Recreation, health care, public safety, housing		
What other information do we need to know about our community for our particular program?* What are the most important influences?		

REFER TO THIS INFORMATION IN PLANNING FOR YOUR VOLUNTEER PROGRAM!

\*Additional information for:

SCHOOLS

Community attitude toward school's effectiveness

Test scores

Numbers of private/parochial and public schools

CHURCHES/SYNAGOGUES

# of registered members

#of active members

% of people in community who do/do not claim religious affiliation

Ecumenical efforts in community

# What Skills Do Effective Managers Need

Volumes have been written about management. In responding to the question, "What skills do effective managers need?", the goals of this workbook are limited. Methods of effective communication are touched upon as skills needed by members of any management team. Leadership styles and delegation of responsibility are explored briefly to either initiate or review looking at oneself as a leader. The specific functions that a manager of a volunteer program performs (planning and implementing job development, recruitment, training, etc.) are covered in Section II. This is a skills overview, that respects your time limitations. It begins with a look at the volunteer program manager as . . .

## Manager in the Middle

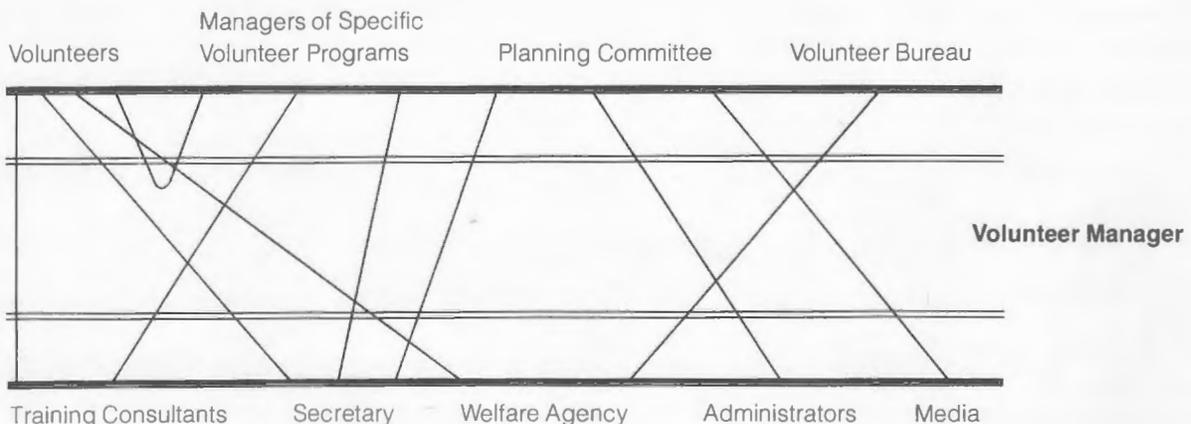
The worksheet on p. 33 is a guide to help you identify the people with whom you work. You may be surprised to discover the complexity of interactions. This exercise can help you identify why you're so busy.

The manager of a volunteer program links people and enables them to work together. Lines in the following example represent the linking done by the manager of the public welfare volunteer program.



Some of the people a manager of a public welfare program interact with include:  
Welfare agency administrators, Volunteers, Media, Managers of volunteer programs, Training consultants, A planning committee

Some of the interactions represented by the lines in the example might be: Arranging training opportunities — linking training consultants with volunteer leaders and program managers, placing volunteers in agencies linking volunteers and agency managers (who then connect volunteers and clients); Input from agency staff and administration to the planning committee; Follow through on public relations ideas from the Planning committee to the media.



# Worksheet # 7

## Manager in the Middle

Goal: To identify which people I link together and how people are linked by my communication.  
Suggestions: Make a list of all the individuals and groups (by position or title) with whom you interact. To identify the management team, make a check by the people who share management responsibilities. Then draw a circle representing your management role. Randomly record all the people (identified by role) around the circle. Link with lines the people you link by communication. This represents some of the responsibility you have as enabler.

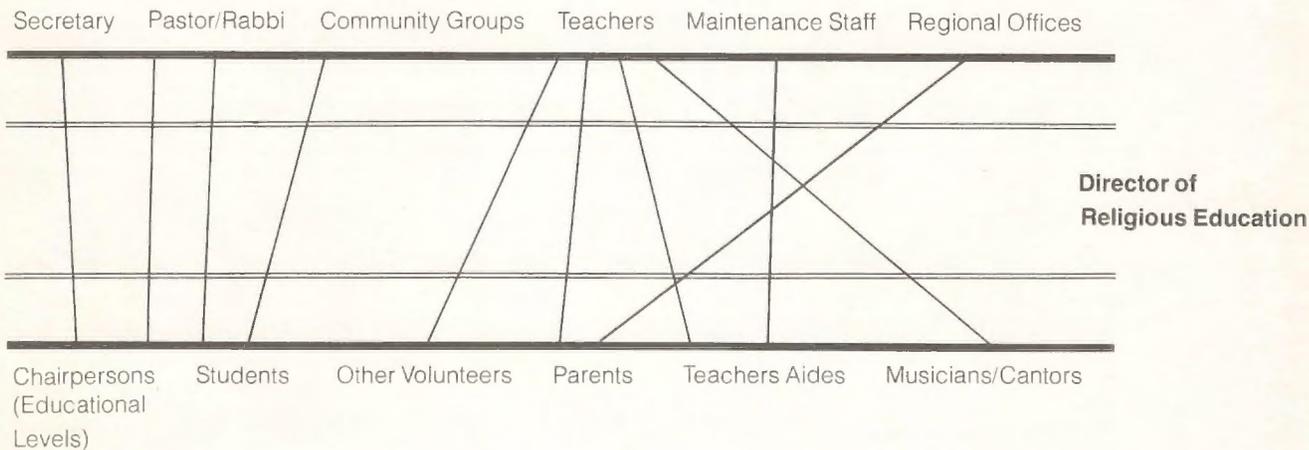



MANAGER IN THE MIDDLE

A church or synagogue Religious Education Coordinator would interact with:

- |                           |   |
|---------------------------|---|
| Pastor/Rabbi & associates | Chairpersons of each Ed. level (preschool thru adult) |
| Teachers                  | Secretary   |
| Maintenance staff         | Musicians/Cantor                                      |
| Teachers aides            | Other volunteers                                      |
| Parents                   | Regional/diocesan offices                             |
| Community groups          |   |

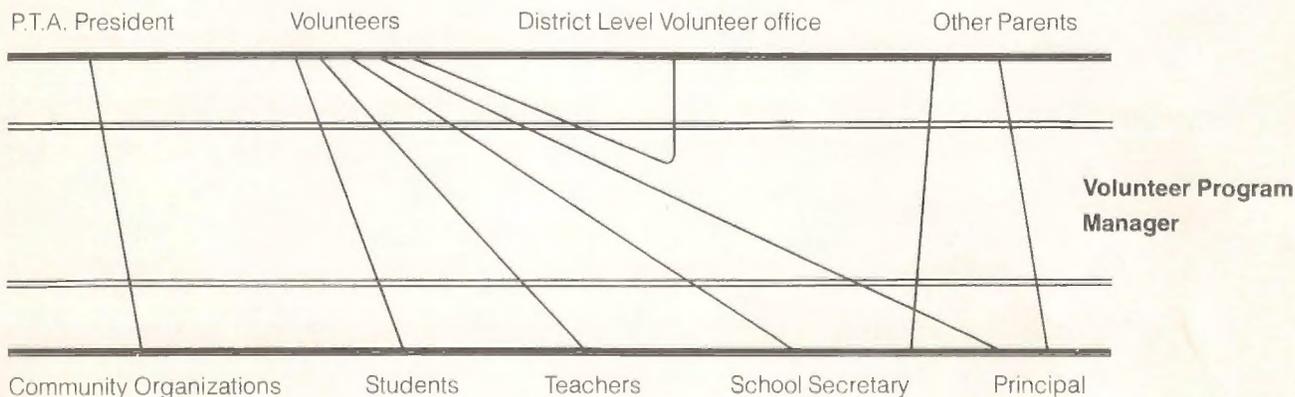
Some of the interactions represented by the lines in this example of a church/synagogue program might be: arranging opportunities for the Pastor/Rabbi to meet with the students during class time; bringing together musicians and teachers to plan a special celebration, orienting parents about the ways volunteers help the program; encouraging students to participate in a volunteer recognition project; bringing together a planning group for program coordination.



A school program manager would, for example, interact with:

- |  |                                  |
|--|----------------------------------|
| Volunteers (parents and others from community) | School advisory committee        |
| Other parents                                  | Students                         |
| Teachers                                       | PTA president                    |
| Principal                                      | School secretary                 |
| District Coordinator of Volunteer services     | Community organizations/business |
|  | Classroom aides (paid)           |

Some linking interaction(s): communicating the volunteers' concerns to the principal, presenting to the volunteers the general guidelines for working in the classrooms as requested by the teachers, keeping in close contact with the school secretary so information can be given to volunteers when the volunteer program manager isn't available.



## Effective Communication

The basic skill needed for linking people, as 'Manager in the Middle', is effective communication. Communication of ideas and thoughts demands skill and patience. First, a clear message must be sent. Then the listener must hear or read what was intended.

Effective listening isn't always easy. It's hard to put one's own thoughts aside and to tune in to what the person speaking really means. Gestures and facial expression can give clues to messages. It is helpful to check with the person who is speaking to see if you really did understand. It takes time to listen, but time is saved if misunderstandings are avoided.

There are blocks to understanding: differences in backgrounds and life experiences, assumptions made about the other person, and differences in values. These blocks are weakened by better listening and increased awareness of others and oneself.

Every management function, every interaction depends upon effective communication. If energy is being spent within your program clarifying misunderstandings, there may be basic communication problems. Time spent learning communication skills and group process is a most worthwhile investment. A workshop within your organization not only would be helpful to individuals but also builds a 'team'.

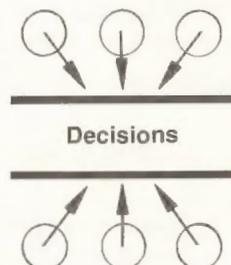
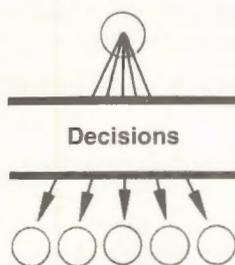
This workbook stresses the importance of team planning. When people are involved in decision making, they offer diversified ideas and share ownership in the end result. The importance of a decision to both the program and the people involved is a consideration. A simple decision that has minimal effect or importance can be made alone to save time and energy. Decisions also may have to be made alone when there isn't time to involve others.

The method of decision making chosen by a manager reflects leadership style. Decision making spans from:

Not sharing responsibility-  
decisions made at the top  
(autocratic)

TO

Sharing responsibility-  
team members are given  
opportunity to contribute to  
decision making or it is  
delegated (democratic)



(with interim degrees of participation)

## Leadership Style

Many theories exist and are developing about leadership. I've chosen to concentrate on Paul Hersey and Kenneth Blanchard's Situational Leadership Theory. Their material is practical, easy to apply personally, and provides valuable potential insights for any volunteer program manager. Materials are available that expand the short introduction provided in this workbook.

The ways you, as manager, accomplish tasks and relate to people reflect your particular leadership style. Leadership style is defined by Hersey and Blanchard as "...the process of influencing the activities of an individual or a group in efforts toward goal achievement in a given situation."<sup>6</sup> They identify two types of leadership behavior.

"Task behavior is the extent to which a leader engages in one-way communication by explaining what each follower is to do as well as when, where, and how tasks are to be accomplished.

"Relationship behavior is the extent to which a leader engages in two-way communication by providing socio-emotional support, 'psychological strokes', and facilitating behaviors."<sup>7</sup>

This example indicates very basically how a manager of volunteers can apply these principles. The situation: A volunteer program has expanded and the full time volunteer program manager needs office assistance. A one half day a week position of office assistant is developed. Responsibilities include typing, some record keeping, and answering the phone. The volunteer who is placed in the position is new to the organization, but received a general introduction to organization purpose and goals at an orientation session.

### *Situation*

The volunteer is new to the task

### *Leadership Style*

Give strong support in helping the volunteer understand the task (High task/low relationship)

(The volunteer is given information about the specific job; where supplies are kept, how to use office equipment, where to locate information when answering phone calls)

A manager's own values system and needs influence his or her emphasis on task and relationship behaviors. A style preference generally evolves as a person experiences leadership, and may emphasize defining tasks, relating to people, or some combination. One volunteer program manager might be more comfortable directing others in setting up the physical area for an orientation, which involves accomplishing a task. Another manager may feel most fulfilled when enabling others to participate in the new volunteer orientation process. This sharing of leadership responsibility is an example of relationship behavior.

Four styles of leadership are described in Situational Leadership: High Task and Low Relationship; High Task and High Relationship; High Relationship and Low Task; Low Relationship and Low Task. Hersey and Blanchard propose that a leader's preferred style can and should be expanded. There is a need to be flexible, because the appropriateness of leadership style depends upon the specific situation that exists. A leader expands effectiveness when he or she learns to analyze a situation, then respond accordingly.

As the task becomes more familiar

Continue direction re: the task and add stronger relationship support (High task/high relationship)  
(Manager works with volunteer, reinforcing task information and adds orientation on how interactions through the volunteer office affect the organization. Time is spent building trust and comfort with the job.)

When the volunteer is comfortable with the task

Still reinforce with relationship behavior but less support is needed with the task. The volunteer may be ready to participate in planning, problem solving. (High relationship/low task)  
(Invite the volunteer to help with annual planning. As leader, encourage utilization of the volunteer's insights and experience. Perhaps give volunteer an opportunity to explain how the office 'works' at the general orientation for new volunteers)

The volunteer now feels self motivated, is able to work independently and share leadership.

Delegate responsibility but be ready to offer support if change occurs (new task, relationship, or personal crisis) (Low relationship/low task)  
(Volunteer initiates job expansion to independently compile a monthly "Volunteer News Bulletin"-Checks with manager for any additions or clarification before printing because the manager is still accountable for the total program)

The willingness and ability of an individual or group to accept responsibility for achieving goals is termed by Hersey and Blanchard as "Maturity." Growth toward maturity is encouraged by the education and experience made available to the 'follower.' Maturity is evaluated only in relation to a specific task. In Situational Leadership, the situation (which includes maturity of the follower) is evaluated to determine how much task and relationship behavior is appropriate for the leader (Leadership style).

It is important to move carefully from one leadership style to another. Timing is critical. If a leader (volunteer program manager) alters leadership style before the situation warrants change, the follower (volunteer) could feel deserted and left to flounder. If a manager chooses to maintain high support of relationship and task, the volunteer is blocked from a move toward independence and maturity.

The Hersey and Blanchard Leadership Effectiveness and Adaptability instrument (LEAD) can give you feedback on your leadership behavior. A basic overview can be obtained through the Situational Leadership summary handout, LEAD-Self Instrument, and LEAD-Directions for Self Scoring and Analysis. For a more detailed discussion of the Situational Leadership Theory and a synthesis of many widely used concepts in the field of leadership, consider Hersey and Blanchard's book, *Management of Organizational Behavior: Utilizing Human Resources*.

A brochure with more specific descriptions of these materials and how to order them can be obtained from:

Learning Resources Corporation  
8517 Production Avenue  
San Diego, CA 92121

## Delegating Responsibility

Many managers feel it's easier to "do it myself." This eliminates the risk of jobs not being accomplished, but unless the manager is a superperson, he or she can become very overworked and weary. Potential benefits of the volunteer program can be lost unless responsibilities are delegated. With shared responsibility, more people give input and feel an integral part of the program.

Marlene Wilson observes in her book, *The Effective Management of Volunteer Programs*, that "What delegation does not do is eliminate work, it simply changes it. As a person is able to delegate appropriately, you see a multiplier effect occur. The time spent doing one job can be spent in enabling several people to do numerous jobs."<sup>8</sup>

To make delegating easier and safer consider:

1. Attitudes in the organization regarding shared responsibility
2. Problem prevention through good management
3. What alternate plan exists in case a problem does arise and a job isn't being done

1. What is the attitude regarding shared responsibility?

Is a job really delegated or is there someone overseeing each step? Since the manager does retain accountability for the program, some supervision is appropriate. However, effective delegation allows room for the volunteer to be creative.

Is there a history of people being expected to assume responsibility or does everyone feel a few people do all the work?

How is delegation of responsibility decided? Is it a shared process?

2. Problem prevention — Are these points considered when a person is offered a responsible job? Is the volunteer . . .

- . . .brought in on planning
- . . .clear about what the job involves after mutual negotiation
- . . .placed in a responsible position that is appropriate for his or her interests and talents
- . . .given adequate orientation and training
- . . .offered support with an appropriate amount of supervision
- . . .aware of what records need to be kept
- . . .given time for two way evaluation on how things are proceeding
- . . .made to feel appreciated

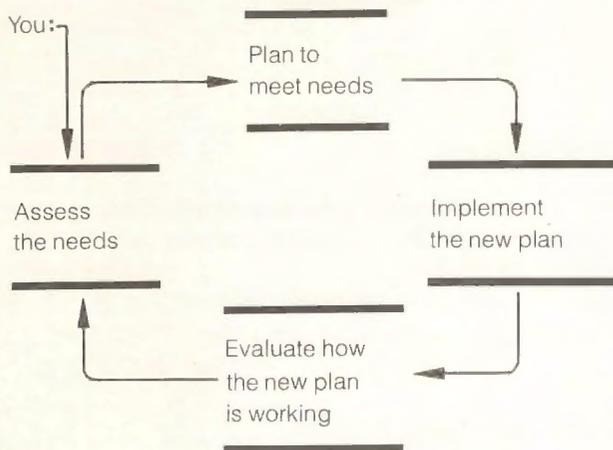
(Each of these points represent management functions, and are explored in Section II)

3. Is there a plan for change if the job that was delegated is not being accomplished?

Needs change when a job isn't being done. A new plan is in order, so the task can be implemented. And if evaluation is an ongoing process, you as manager can identify a problem while there is still time to do something about it. Your volunteer program can be equally prepared to solve a problem as to prevent one.

Let's think through an example. A volunteer wanted to assume leadership in training new volunteers and, in your judgement, had the qualifications to do the job. Evaluations indicate the training done by the volunteer was not effective. Your goals are to have training accomplished (task) and to give growth opportunity to the volunteer. What are the needs now that the job isn't being accomplished? How does the volunteer feel? Perhaps he or she is overwhelmed and overestimated his or her ability. Perhaps

the training format is outdated. It's time to invite others to help you:



You, as manager in the middle, utilize communication skills, leadership, and ability to delegate. It is healthy to remember that. . .

### Managers Have Needs, Too!

Volunteers are better able to give service to others if their needs are met. It would be hard to convince volunteers that they can validly identify and meet their own needs if you, the manager, do not model the same process. You and the other people on the management team can work together better if time is spent sharing your needs and personal goals. Having your goals met should be a benefit of your job.

What are the reasons you chose or accepted your management role? Worksheet # 5, "Why I Volunteer" may be helpful — just retitle it "Why I am a Volunteer Program Manager." Refer to these reasons periodically. Are your needs being met?

Once, when I asked how many people attending a workshop had a job description, someone facetiously quipped, "Yes, I do everything that isn't in anyone else's job description." If you aren't committed to a specific job description as volunteer program

manager, it's easy for others to expect you to do whatever comes up. But then there isn't enough time to accomplish the human relations and management tasks that are the essence of your job.

Do you have a written job description? Does it clearly define what is expected of you?

Does it provide opportunity for you to meet your personal goals?

If you don't have a job description or want to renegotiate the one that you have, Worksheet # 10 may be helpful.

You may find it reinforcing to meet with other managers of volunteer programs to share successes and challenges.



# Worksheet #8

## Where Are We Right Now?

This volunteer program management opinion survey is designed to: a) involve people in an evaluation process, b) give credit for what's already working well, and c) help determine what is needed to improve effectiveness. You may identify a need that isn't covered in this survey. Add your own, please.

It may be difficult to decide which column applies to your situation. The responses are value judgments. The process of sharing opinions increases validity of the survey results. Do invite people who have diverse viewpoints to participate.

Here are suggested guidelines for the survey options:

We do this ..... Could range from outstanding to adequate

We plan to this ..... Concrete plans exist to implement in the near future

We need to work on this ..... Aware of need, but no current plan to implement

We don't need this ..... At this time could function well without

Check the column that reflects your current evaluation of the volunteer program.

We do this	We plan to do this	We do not need this	We need to work on this
---------------	--------------------------	---------------------------	-------------------------------

**PLANNING**

- The purpose of the organization/group is understood and agreed upon by the planning group.
- The purpose of the volunteer program is understood and agreed upon by the planning group.
- Planning is accomplished by a team (for example: manager of the volunteer program, paid staff representatives or organization officers, volunteers)
- Organization/group needs are surveyed as a basis for planning
- Needs are valued in order of importance.
- The following *are considered in planning*:
  - Why volunteers are involved
  - Changes in volunteering
  - Forces influencing our program
    - Organization purpose, funding, and history
    - People — volunteers, staff, those receiving program benefits
    - Community — strengths and challenges
- Objectives (actions that facilitate meeting purpose and goals) are achievable, measurable, and time oriented.
- Everyone understands who is responsible and accountable for each objective.
- Management is shared, but well defined.
- Communication lines are open among staff, volunteers, and the volunteer program manager.
- The volunteer program has a budget. Funds are available to implement the plan.
- Controls are set to keep us on target, such as standards of performance, opportunity for feedback.

--	--	--	--

We do this	We plan to do this	We do not need this	We need to work on this
---------------	--------------------------	---------------------------	-------------------------------

**JOB DEVELOPMENT**

The volunteer program manager, paid staff, and volunteers give input to the development of written job descriptions.  
 Expectations (time commitment, job duration, inservice, etc.) are agreed upon by all people developing the job descriptions.  
 Limitations of each volunteer position are outlined along with the job scope.  
 Benefits for volunteers are defined.

**RECRUITMENT** (Shouldn't start until all implementation steps are planned and ready to go).

We know the type of people we need and where to locate them.  
 We have a beginning of the program cycle recruitment plan.  
 There is a process for ongoing recruitment.  
 All recruitment options (newsletter, personal contact, bulletin boards, media, etc) are utilized that are appropriate for our program.

**ORIENTATION**

Time and content are planned to meet the needs and expectations of those attending (new and returning volunteers).  
 Orientation:  
     contains an overview of the organization, of the volunteer program, and job opportunities.  
     is presented so participants are both informed and involved.  
 Options for orientation are planned (a variety of times and approaches) that respond to individual needs.  
 Written orientation material reinforces the information covered at the orientation sessions.

**INTERVIEW AND PLACEMENT**

Both organization/group needs and volunteer needs are considered in placement.  
 Position requirements, benefits, and time commitments are mutually understood and accepted.  
 Initial placement is conditional, based on mutual satisfaction after an agreed upon length of time.  
 There is opportunity for the volunteer to change jobs for career advancement, variety, or other reasons.

**PRESERVICE AND INSERVICE TRAINING**

Training is a clearly defined expectation for each job.  
 There is preservice and inservice training offered for each volunteer position.  
 General interest inservice that relates to the organization or field of service is offered to staff and volunteers.  
 A resource library is available for volunteers and staff.

**SUPERVISION**

Supervisors of volunteers (paid or unpaid) and volunteers understand their roles and responsibilities.

--	--	--	--

We do this	We plan to do this	We do not need this	We need to work on this
------------	--------------------	---------------------	-------------------------

**SUPERVISION**

There is an effective communication system among the volunteer program manager, other staff, supervisors of volunteers, and volunteers.  
 Ways of continually strengthening this communication system are explored.  
 Inservice opportunities on how to effectively supervise volunteers are made available and are attended.

**RECORD KEEPING**

The forms used are relevant.  
 Volunteer service, hours, and accomplishments are recorded.  
 There is a central file location, efficient procedure, and process for keeping information confidential.  
 Information that is recorded is evaluated annually to determine what is useful.

**EVALUATION**

The policy making body, management staff, volunteers, and those receiving benefit from the program are given opportunity to participate in evaluation.  
 The program achieves its objectives.  
 Evaluation is an ongoing process, and includes all aspects of the volunteer program.  
 Information obtained from evaluation is used in future planning and is made available to those who contributed to the evaluation process.

**RECOGNITION**

All who share responsibility for the volunteer program plan and implement recognition activities.  
 Recognition corresponds to the varied motivations that volunteers have; such as achievement, leadership, service, and socialization.  
 Recognition occurs the year around (monthly, mid-year, a special smile or special event).  
 Volunteer achievement records are provided that we can be personally and professionally helpful.

--	--	--	--

After you've used the survey, if you felt this:

"I didn't realize that was what we did."

"This gives me an overview."

"Its so obvious."

My feelings are \_\_\_\_\_

\_\_\_\_\_

It may mean you could .....

Give credit for the professional quality of management you're accomplishing.

Feel the balance of what's already being done with what still needs work and not feel overwhelmed.

Validate management as common sense response to a need.

Which may mean \_\_\_\_\_

\_\_\_\_\_

Section 2

# Helping People Volunteer

Suggestions to Consider

# Planning for Effective Management

## Pre-Planning

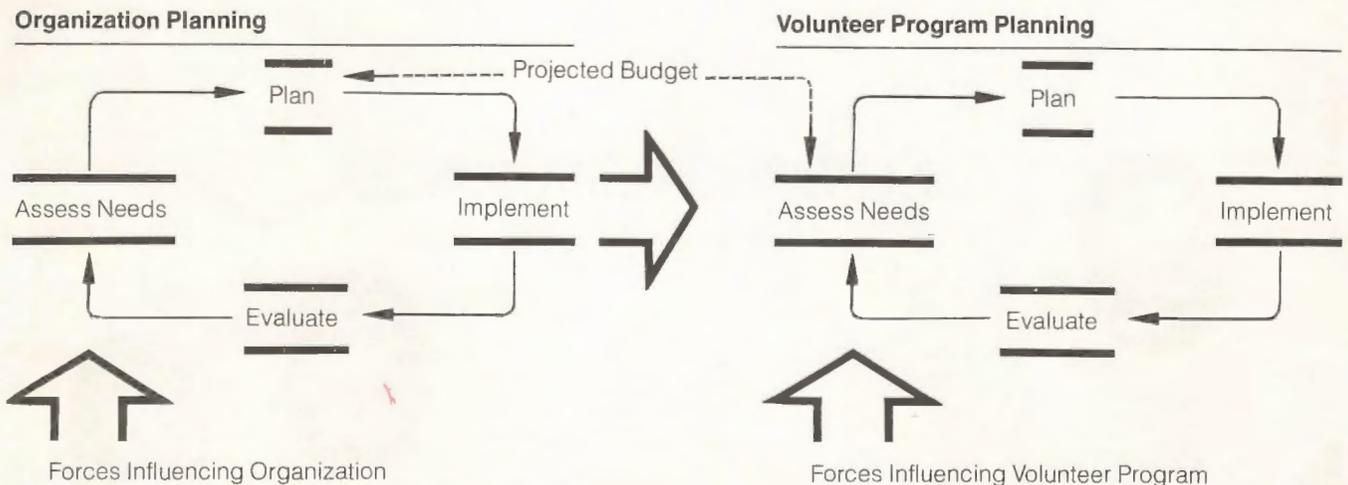
Planning is the key to your volunteer program's success. A program doesn't work through magic. . .it takes management. And management doesn't happen unless you plan for it to happen.

But wait! Planning for the total organization or program must take place before volunteer program plans can be made. Volunteers are part of a bigger picture. As volunteer program manager you should contribute to the total organization planning process. The planning cycle includes: needs assessment - planning - implementation evaluation.

All the people who share responsibility for planning must generally agree upon the purpose of the program. Then needs that

enable people to meet that purpose are assessed, plans are made based on goals (that respond to the identified needs), the plan is implemented, and accomplishments are evaluated. After the organization plans are completed, you'll know more clearly how volunteers can contribute. Then it's time to plan for the volunteer program.

A second needs assessment, planning, implementation, and evaluation cycle is necessary for the volunteer program. The relationship between the organization plan and volunteer program plan is two way. The overall organization plan is one part of the volunteer program needs assessment. The volunteer program plan (when implemented) contributes to the general organization plan being accomplished.



This volunteer program planning process doesn't happen often enough. *Helping People Volunteer* maximizes benefits of planning in relation to the amount of time spent. Section I is a guide for part of the needs assessment. (You'll also use the organization plan, past program evaluations, etc.) The worksheets in Section II are planning guides for volunteer program management. These sheets can also serve as samples for you to use in designing something specifically for your organization.

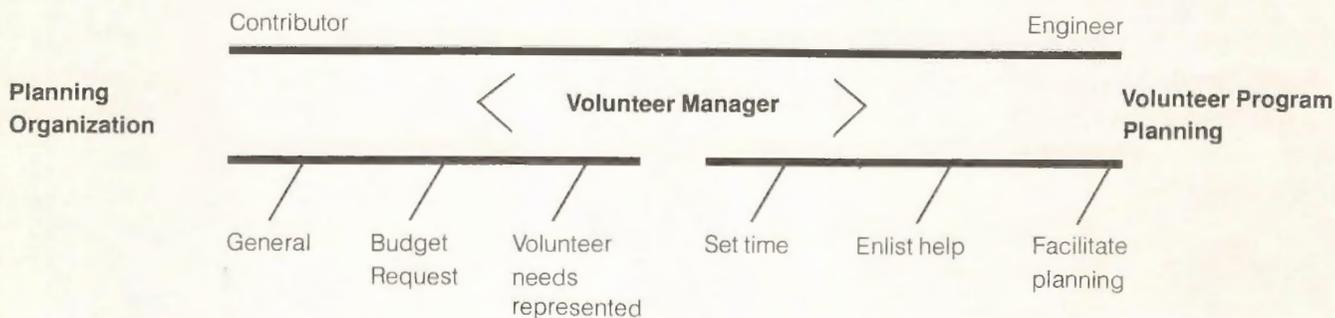
Your role in total organization planning is supportive, but for the volunteer program planning YOU'RE THE ENGINEER! You make it happen by setting the time, enlisting help, gathering information for the needs assessment, and facilitating the planning session(s).

### Setting The Time

It's imperative that there be enough time between completion of the organization planning and the beginning of the program cycle to plan for the management of the volunteer program. You may need to encourage an earlier organization planning date than is scheduled by letting the organization director/president know about your need for planning time.

If a program begins in the fall, planning for volunteers can't wait until September. If the organization plan is completed by May 1st, the volunteer program planning can be scheduled for mid May.

What if your organization doesn't have program planning that includes many staff members? Use a tactful approach when you initiate volunteer program planning to make the process a model instead of a threat.



## Enlisting Help

When you invite others to help plan, assure them you respect their time limitations and other responsibilities. Help them see the OUTCOME or benefit of time spent on planning for the volunteer program. An effective volunteer program is important because:

1. The organization program can be enhanced by having volunteers.
2. Time is saved if problems regarding volunteer involvement are prevented.
3. Clear understanding of roles and responsibilities make the organization more pleasant, effective, and compatible for all involved.

Ideally everyone can be involved who: has information and ideas to contribute, can benefit the volunteer program management by understanding and supporting the plan,

and can share ownership in the program by participating in the planning process.

Not everyone can be involved in the total planning process, so offer a variety of ways to participate. One way is direct involvement in the planning sessions. Another is to contribute ideas, written and verbal, that can be incorporated into the plan. Some people may not be able to give much time. Minimal time commitment is involved in reviewing the finished plan in a board or executive committee report. This provides opportunity for response to the plan. People are busy and appreciate having options that encourage wider participation.

Ask others to help you evaluate who could contribute to the planning. Your final list of people and ways they can participate could look something like this:

	Needs Assessment	Planning	Review of Plan
Administration/management or president	✓	✓	✓
Policy makers (board/ executive committee)			✓
Supervisors	✓	✓	✓
Volunteers	✓	✓	✓
Program participants or club members	✓		✓

Many people contribute to a planning process. *Make sure that everyone who gives input has an opportunity to see the finished plans.* This helps people experience ownership of the plan and gives credibility to the process.

## Assessing Needs

The following sources provide information you can utilize when planning the management of your volunteer program.

1. ORGANIZATION PLAN — the section of the plan that affects volunteers. Identify what is expected of the volunteer program in objectives that are measurable, specific, and possible. BUDGET limitations are also obtained from the basic organization plan.
2. VOLUNTEER NEEDS — Section I examines the volunteer program as:  
*Vital* — Question 1 “Why have volunteers?”  
*Vulnerable* — Question 2 “What forces influence your volunteer program?”  
*Viable* — Question 3 — “What skills do effective managers need?” Effective management is possible.
3. Volunteer program MANAGEMENT NEEDS — Question 4 — Opinion Survey “Where are we right now?” The survey results narrow down what you, as manager, and others feel needs improvement. By concentrating first on the greatest needs, planning will be easier to implement.

Summarize any evaluation information from the past year to have as an important reference. Your planning group may also identify other information sources for assessing needs.

When you bring a group together, utilize their time effectively. You won't want to use all of the worksheets from Section I during the planning session. It's your responsibility to gather the information and summarize it. This brings the group to a shared awareness of program planning needs. Needs assessment is an ongoing project that you do as part of your management responsibilities. You could, for example, ask for a few minutes at a staff meeting to give people an opportunity to think about “Why we have volunteers” or analyze how

members of your organization work together. Then during planning, refer back to the results and summarize.

## Planning

After summarizing the information you've gathered in the needs assessment, you're ready to plan. Written summaries (handouts or wall charts) are useful references.

Let's presume that two major concerns emerged in the survey. Job descriptions were felt to be inadequate and supervision needed improvement. These two management functions are the planning focus, in this instance.

To plan for job description, the group discusses information submitted by volunteers, supervisors, etc. from Worksheet 10. Differences in perception are negotiated and resolved. Then you have consolidated information when drafting the job descriptions. If there is no disagreement in the information submitted, the planning group sees that and feels comfortable about the process.

To plan supervision, the process described in Worksheet 15 is useful.

A report from the volunteer program manager on continuing management practices can provide everyone with an overview of the program that is already being implemented. The management functions that work become standard operation.

## Volunteer Program Budget

A major consideration in planning is the projected BUDGET. If volunteer hours were tabulated at minimum wage, the equivalent monetary value of donated time would be significant. Volunteer programs are generally cost effective and far exceed the money that would be spent if services were reim-

bursed financially. Yet funding is seldom preplanned for the volunteer program. Effective management is difficult to achieve when every minor expense has to be requisitioned.

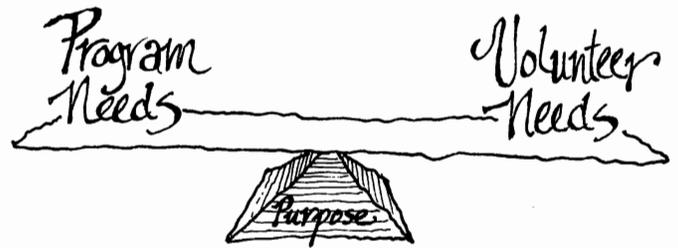
Some budget items could include:

- Staff salaries — paid managers are increasing in number as professional preparation and recognition of the value in having a staff position increases.
- Inservice time, travel reimbursement, and office space are costs if the manager (paid or nonpaid) is on site.
- Other expenses include office supplies, printing, resource materials and mailing.
- Reimbursement of volunteer's out of pocket expenses.

### **Plan Based on Purpose**

Your organization or group has a purpose or mission, a reason for being. The volunteer program also has a purpose. This purpose enables volunteers to help meet the organization's goals and at the same time responds to volunteer needs. Equal response to program and volunteer needs at all times isn't possible or necessary. Sometimes more effort will be expended on program and other times on volunteer needs. However, there is need for overall balance.

The results of planning are clear objectives that are specific, measurable, and possible to accomplish. The worksheet guides in Section II direct your planning for specific action steps within a measurable time frame. Objectives also must be possible or 'do-able'. Everything covered in this workbook doesn't have to be accomplished for a program to be effective. Limitations exist that must be considered while plan-



ning. The amount of time you, as manager, can actually spend working with volunteers (when in a part-time position or having other program responsibilities) is one consideration. The budget of the volunteer program has an impact. There is cost, even when there are no paid staff. The degree of support from the person or persons accountable for the entire program or organization influences how much can be accomplished. The amount of support and time committed by those who supervise volunteers also determines what plans can be made. Here is an important caution. Plan to implement management that works for your organization, and don't try to do more than is possible. Nothing is more discouraging than having unrealistic objectives. It's a design for failure.

# Worksheet # 9

## Planning Guide

Goal: To identify people who can contribute to planning and assess information needed for planning our volunteer program management.

Suggestions:

1. After the organization plan and program beginning dates are established, set the volunteer program planning date.
2. Determine which people could help and ask them. Negotiate which ways they can be involved.
3. Gather all information that is needed for planning, or incorporate needed steps in the planning process.

### 1. TIME SEQUENCE

Organization plan completed by	(date)	Volunteer program planning	(date)	Beginning of program cycle	(date)
--------------------------------	--------	----------------------------	--------	----------------------------	--------

### 2. PEOPLE WHO WILL CONTRIBUTE TO PLANNING

### WAYS THEY WILL BE INVOLVED

	Needs Assessment	Planning Process	Review Of Plan
Administration/management			
Policy makers-Board			
Advisory council			
Supervisors			
Volunteers			
Program participants			
Other			

### 3. NEEDS ASSESSMENT — Information needed before planning: Do we have. .

- Organization Purpose and needs — completed objectives
  - Volunteer needs and Volunteer Program Manager needs
    - Understanding of why we have volunteers.
    - Forces identified that influence the volunteer program
    - Clear understanding of volunteer managers role and skills
  - Volunteer program management needs
    - Input from program participants, supervisors, etc.
    - Program evaluations
    - Survey results: Where are we right now?
    - The survey response indicates that the following management functions are most important to consider in our planning.
- |  |  |   |
|--|--|---|
| <input type="checkbox"/> Job Development | <input type="checkbox"/> Training            | <input type="checkbox"/> Record Keeping |
| <input type="checkbox"/> Recruitment     | <input type="checkbox"/> Interview/Placement | <input type="checkbox"/> Evaluation     |
| <input type="checkbox"/> Orientation     | <input type="checkbox"/> Supervision         | <input type="checkbox"/> Recognition    |

Worksheets from Section II can be used in planning.

# Job Development



Potential volunteers want information about a job before they commit their time and talents. They deserve to know what is expected of them before judging whether a job is possible or of interest to them.

Good job definitions can prevent problems. To define a job, input from others is necessary. Program managers and those responsible for supervising volunteers think through the program needs and what they expect while preparing job descriptions. Volunteers, when they examine expectations and benefits, can make decisions based on their own needs and limitations.

To develop a job description, ask:

1. What information should be included in the job description to honestly represent what the job entails?
2. Where is that information found and who provides needed input?
3. Why would someone want to do it?

You, the program manager, and your planning team can answer these questions. The OUTCOME or desired result is to give enough information to potential volunteers that they can make an informed decision on existing jobs OR negotiate a volunteer initiated job.

Job descriptions differ according to the degree of responsibility of the volunteer position. Marlene Wilson in her book, *The Effective Management of Volunteer Programs*, offers these suggestions:

"Most responsible volunteer jobs

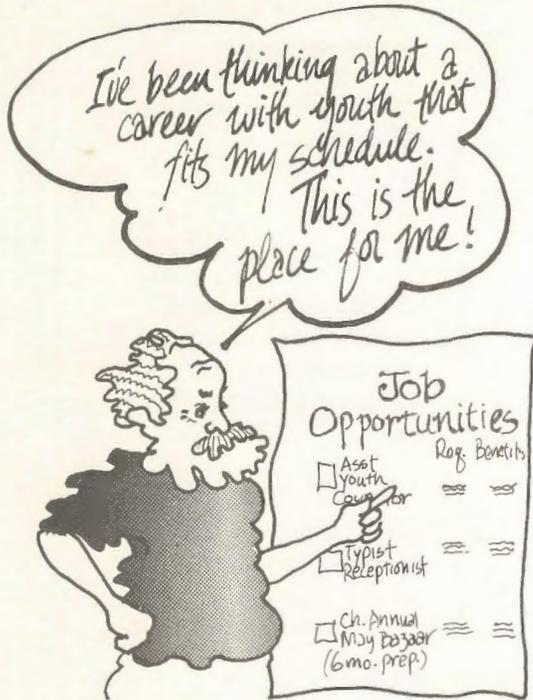
Define broad areas of responsibility and authority. Assign responsibility, not specific, detailed tasks. Allow person to negotiate time and manpower needs. Skills and abilities required should be defined. Leave room for initiative and creativity in how responsibility is carried out.

Less responsible jobs

Task generally spelled out fairly well  
Time and skills required are defined.  
Lines of responsibility and authority indicated.

Least responsible jobs

Duties, time and skills clearly defined.  
Much more specific re. tasks—exactly  
what needs to be done and when.”<sup>9</sup>



The basic information for a complete volunteer job description includes: WHAT the job title is, HOW the job is important to the program goals, BENEFITS to the volunteer, REQUIREMENTS of the volunteer (abilities and willingness to do the job), LIMITATIONS of the position, the TIME COMMITMENT, and general identification of the SUPERVISOR.

This information is obtained by examining program, volunteer, and management team NEEDS.

Answering the following questions provides information needed for developing a job description: What is the job title? How is it important to program goals? What are the benefits to and requirements of the volunteer? What time commitments and limitations exist? To whom is the volunteer responsible (who is the supervisor)?

PROGRAM NEEDS: How does this job relate to the basic purpose of the organization and the volunteer program? Is this a policy making, direct service, management, fund raising, or support function?

VOLUNTEER NEEDS: What motivations could be fulfilled? What information will help the potential volunteer decide if the position is possible and desirable? (skills, talents needed; time requested—regular or flexible hours; duration of commitment)

MANAGEMENT TEAM NEEDS: What basic information and experience does the volunteer need before starting in the position—amount of training expected, job time commitment? What legal requirement exists? Who is willing to and capable of providing the appropriate amount of supervision?

After obtaining information, by examining program, volunteer, and management team needs, you can be ready to write job descriptions that represent the expectations honestly. A clear job description enables volunteers to make a decision that is good for them and for the organization.

While developing job descriptions are:

\_\_\_The people supervising positions asked for input before the job descriptions are written?

\_\_\_Volunteers currently working in positions asked to give input before development and to critique the descriptions as honestly representing the jobs?

\_\_\_The final draft of the job descriptions approved by supervisors?



Newsletter Editor

*Works with a committee to compile and print a monthly organization newsletter*



Synagogue board member

*Policy making group for synagogue, responsible for congregation well being.*



Craft workshop volunteer

*Prepare craft supplies to support creative projects & free teachers to work directly with students*

DESCRIPTION

BENEFITS

*Opportunity for creativity, management experience and project flexibility*

*Opportunity to serve community, ability to influence direction.*

*Can be involved – at home or with others at “Coffee and Crafts” workshop – socialization*

REQUIREMENTS

*A combination of writing, management, and typing (not mandatory) skills is desirable. Attendance of the annual community sponsored publications workshop is requested.*

*Good listener, able to share ideas, make decisions  
Attend annual board retreat  
Willingness to serve on committee, by appt.*

*Artistic talents not necessary, but will be utilized. Willing to complete agreed upon assignment*

TIME

*Printers deadline is the 15th of each month. Time division determined by working committee. Attend monthly board meeting.*

*Two year commitment, eligible for reelection 2 more terms. Monthly meeting – 3rd Thurs.*

*Meet Crafts chairperson Wed. a.m. from 9-9:30 at least once each month for assignment.*

LIMITATIONS

*Final review of content by executive director*

*Legally accountable – directs financial policy – hires (or fires professional personnel-administrator responsible for other staff*

SUPERVISION

*Staff is available for input.*

*Responsible to the electorate*

*Craft chairperson receives requests from teachers, assigns and available to help volunteers.*

# Worksheet # 10

## Job Description

Goal: To accumulate information needed to develop a job description then to translate the information into a complete job description.

JOB TITLE \_\_\_\_\_

A general statement that identifies what this job is:

Suggestions:

Complete the sentences in this column.

Then write a job description that contains the information in the first column.

This job responds to the organization purpose and objectives by . . .

The position involves:

- |   |                                       |
|---|---------------------------------------|
| <input type="checkbox"/> policy making  | <input type="checkbox"/> fund raising |
| <input type="checkbox"/> direct service | <input type="checkbox"/> support      |
| <input type="checkbox"/> management     | <input type="checkbox"/> services     |

### BENEFITS

Volunteer will gain in this position (motivations met). . . How?

### REQUIREMENTS

Skills and talent needed for this job are. . . .

Typical tasks include. . .

Training needs are. . .

### TIME COMMITMENT

Duration of commitment is. . .

Time expectations are:

- regular basis (how often and how long
- flexible & negotiated
- self determined, based on job expectations

### LIMITATIONS

Existing legal requirements are. . .

Staff accountability and responsibilities that only paid staff can assume. . .

### SUPERVISION

Who . . . and when. . .

# Recruitment

"We need volunteers! How can we recruit them?"

STOP. One of the most important strategies for successful recruitment is careful timing. First plan to RETAIN volunteers, then recruit. Too much energy is spent recruiting before enough preparation is made to keep them.

What is the desired outcome, or result of recruitment? Numbers brought into an organization have little significance if there are equally large numbers leaving. Some avoidable problems cause dissatisfaction. Too many volunteers think a job is this big  and it turns out to be this big!  Then other individuals volunteer and are never called. Newly recruited volunteers are ready to be oriented, trained, and placed in a job. If that doesn't happen, people lose interest or go elsewhere to find a place that is ready for them.



## Steps To Take in Planning Recruitment

What is our purpose, our need for volunteers? That must be clear to you and communicated to potential volunteers. Be specific also about what jobs are available.

It is important to know whom you are trying to reach. Think back to the changes in volunteering. Women are exploring options, so don't plan only on the moms. Earlier retirement and shorter work weeks for many people who work are factors to be considered. Students may be exploring careers or anticipating classroom credit. The first people to approach are those who share the interests and values of the organization. And try not to recruit too many or too few.

It may be helpful to examine expectations. Do you, as manager of a volunteer program, really believe new people will accept responsibility? Is there a willingness to risk asking people who haven't worked with the program? It is easiest to approach those who are already involved, but this is very limiting.

Recruitment takes place as an *ongoing process*, accomplished by everyone involved in the program. An annual recruitment drive may be helpful. If you advertise all jobs before the program cycle begins, prospective volunteers can look at a total overview of options. Then the program manager needs to keep everyone updated on jobs that open during the rest of the year. New jobs and replacement opportunities do become available.

The *beginning of program cycle* recruitment is most effective if it's well timed. It should correspond to the months in your organization when people make next years commitment. While returning volunteers make their decisions, new volunteers are recruited. There must be time to orient, place, and train them for the program beginning. Program cycles often start in September, so late spring is a reasonable time for recruitment. The summer months do cause a delay between recruitment and actually beginning a job, but the volunteer can start job preparation (placement, training) right away.

In our mobile society, *new members and program participants* may appear at any time. Plan to greet them and offer an opportunity to become actively involved. Many people aren't outgoing enough to ask to volunteer.

Present materials in as many different places and ways as is practical within your time and funding limitations.

#### PLACES:

Organization bulletins

Announcements at meetings of your own group and other groups sharing the same interest

Community bulletin boards, places of business

Local high schools and colleges

Senior centers, clubs

Businesses

Newspapers — local and daily (community based Voluntary Action Center or Volunteer Bureau may sponsor a column for volunteer opportunities)

Media — radio, TV slots may be available as a public service

Booth at a local bazaar, fair, or open house

Everywhere — person to person

#### METHODS:

Let people hear and see your message.

Written brochure: Use eye catching ideas.

Enlist others to help decide what will attract the audience you're trying to reach. Here's a great job for an artistic volunteer. Say enough (purpose, need, specific jobs, benefits for volunteer) but don't say too much or it won't be read.

Posters — perhaps develop a recruitment theme.

Filmstrip or slide presentation — one picture is worth a thousand words.

Prepare radio spots or announcements that can be read at meetings.

Development guidelines on how to effectively recruit one to one. Help people see the importance of the need, where to call, whom to contact.

The Voluntary Action Center or Volunteer Bureau may sponsor referral services to agencies registered with them. Volunteers wishing placement and agencies needing to fill specific volunteer jobs register information with this central referral service.

An initial interview and screening directs the potential volunteer to an agency or agencies that might offer placement, after the screening process determines mutual compatibility.

There may not be an existent referral and placement organization in your community. You may want to bring people together who work with volunteer programs to assist each other with recruitment.

THE MOST EFFECTIVE RECRUITMENT IS  
DONE BY SATISFIED VOLUNTEERS.

THEY SHARE THEIR EXCITEMENT.

## POLITICAL CAMPAIGN

WHEN	WHAT	WHERE	HOW	WHO
 Beginning	Telephone campaign for volunteers	Headquarters & at homes	Compile lists from candidate, friends, supporters of candidates' views	Telephone ch., staff
Midcycle	After primary victory party – for active/potential volunteers	Supporters home or ?	Thanks – Let volunteers know their importance – gear up for general election	Staff
Ongoing	Printed form – Support card	Campaign literature – campaign events	Make info request personal – give many options to help	Staff – coordinator of volunteers
Contact — new members	Build network of area "Key people"	Everywhere	Keep up to date info on needs, benefits	Coordinator of volunteers

 Beginning late spring	Personal contact Parents meeting	Bulletin	Publish fall plans, volunteer opportunities	Volunteer coordinator – and committee Pastor
September	Commissioning service	Church	Reinforce importance of volunteers – invite others	
Midcycle January	"Start the new year as a volunteer"	Church Hall	Booth at the Annual "Organization Fair"	Volunteer Coordinating Committee
Ongoing	Help wanted column	Newsletter Bulletin Board	New jobs advertised Publicize hours donated	Vol. Committee
Contact — new members	Include volunteer information with church directory	At homes	Have packet prepared for home visitors	Vol. Home Visitors

 Beginning	"Welcome" coffee for parents Letter to all parents	Aud.	Brief intro to volunteer program after social hour Sent home with students	Volunteer Prog. Mgr. V.P.M.
Midcycle	Special presentation "You can help – at home or school"	Aud.	Demonstration of tutoring techniques Value of 1-to-1	Guest speaker – resource teacher
Ongoing	"Volunteer Opportunities" Column Posters Encourage volunteers to recruit	PTA Newsletter Neighborhood Stores	Keep openings up to date Keep volunteers satisfied aware of volunteer openings	V.P.M. V.P.M.
Contact — new members	Information packet for new families Offer school tour	Office	Distribute when registering Volunteers prepared to great new families	School secretary Experienced volunteers

# Worksheet # 11

## Recruitment

Goal: To prepare an overview of Recruitment

Suggestions: 1) Review why you're recruiting and what expectations you have, 2) Fill in the times and recruitment methods that you think can be effective, and 3) Check that all resources are being utilized.

1) WHY are we recruiting volunteers?

What is our purpose and the specific need for volunteers?

How can we effectively communicate our need?

Will people know what difference they can make if they give their time to our organization?

What are our attitudes and expectations? (Do we always ask the same people? Are we really willing to include new volunteers?)

2) OUR OVERVIEW OF WHEN, WHAT, WHERE, and HOW

WHEN

WHAT

WHERE

HOW

WHO IS  
RESPONSIBLE

Beginning of  
program cycle

Mid-cycle

Ongoing projects

Contact with  
new members

3) Are we utilizing all potential recruitment resources?

Volunteers who are already involved and excited

Staff — paid or unpaid management team

Volunteer Bureau or other volunteer referral service

Informal contact with other managers of volunteer programs in our community

# Orientation

Once a person makes a commitment to be a volunteer (or even to find out more about volunteering as a possibility), he or she deserves to know some basic things about the organization and the volunteer program. This general introduction is most often called orientation.

CONTENT is determined with input from all people involved. The management team (program manager and supervisors) identify what they feel volunteers need to know before becoming active in the organization. Evaluations of past orientations provide information about what was helpful to other new volunteers. Prospective volunteers can be asked what they want to know about the organization or group. Some newcomers could be asked before the orientation meeting, and everyone at the meeting should be given an opportunity to share his/her expectations.

Not all information can be presented at one meeting. Decisions have to be made about what is most important, possible within the time frame, and reasonable. Some content options include:

- Purpose of the program and of the volunteer involvement
- How the program is organized
- Who the people in the organization are, how they work together, and how volunteers work within the organization
- Expectations of the organization, policies, and values

- Expectations, rights, and benefits to volunteers
- Specific job descriptions
- Tour of the facility

## Method

Involve staff and returning volunteers when presenting orientation information. Timing is important. First you've got to get people to attend. Plan a time when people are already present, if possible. In a youth oriented program, the time the children are participating would be prime. Orientation might also be scheduled just before or after an already scheduled organization meeting.

It's impossible to plan a single orientation that everyone can attend. Offer several options at different times to accommodate work schedules and family responsibilities.

The orientation should be no longer than is needed to accomplish what you decide is basic and necessary. Determine the time frame in advance, let people know the time limit, and *stick to it*.

Orientation provides an opportunity to build community and to bring people on board. Make time to let people get acquainted. Time can be conserved by briefly mentioning some of the content, then presenting it in written form.

Here are some points that can help you plan for an orientation:

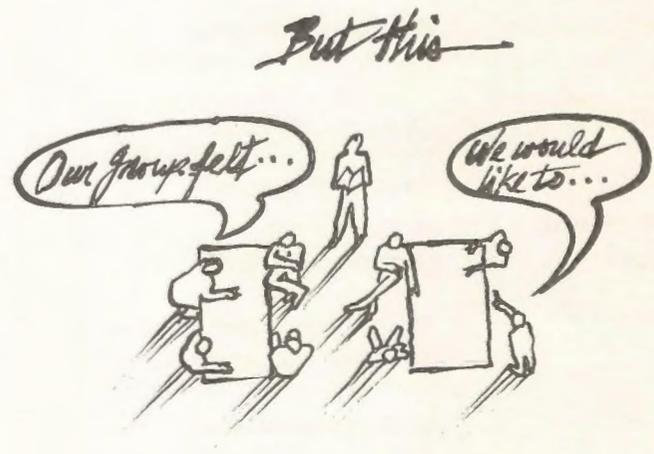
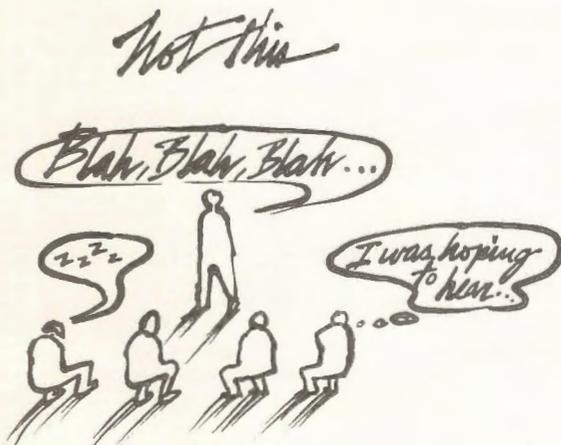
- Respect the way adults learn (See page -training)

- Keep communication two-way. Information needs to be both presented and received. Bring out and resolve concerns.
- Offer a comfortable atmosphere by arranging chairs in a way that encourages interaction, having good light, serving refreshments
- Use creativity in the ways information is presented . . . a panel discussion, slides or a filmstrip, visual aids, exhibits, a tour of the facility.
- Evaluate just how effective the orientation was by obtaining written evaluations from those attending. Use the input to make the next orientation even better.
- Preservice training might be included in the orientation by breaking the large group into more specific interest groups. (The sample orientation, p. 60 describes one way that can happen.)
- Make sure supervisors and other staff know what is presented during orientation by inviting them to attend and distributing a content outline to all staff after orientation. The orientation provides general information that

everyone needs to know. People who are training volunteers for a specific job must know what was already presented so they don't duplicate information.

Written material gives reinforcement to what is covered at the meeting, expands the amount of material that can be presented, and saves time. Some possible handouts include: a summary of the organization purpose and structure, a list of job descriptions, policies, volunteer rights and responsibilities. Avoid, however, overloading with too much paper at any one time.

The orientation is basically a meeting. Try to make it positive. People sometimes come to a meeting with negative expectations and too often get what they expect. If this first experience in the organization is interesting and informative, it will be easier to encourage attendance at future meetings. Worksheet 12 was inspired by *Taking Your Meeting Out of the Doldrums*: Eva Schindler-Rainman and Ron Lippitt.



## ORIENTATION

Who will be attending?	What are their needs and expectations?	What do we want to have happen? OUTCOME	How can we make it happen?
<i>New board members</i>	<i>New members – What will be expected of me?</i>	<i>New members have basic info needed</i>	<i>Stay within time frame – Be well organized</i>
<i>Returning board members</i>	<i>Returning – not wanting to waste time with info already known</i>	<i>Build community</i>	<i>Involve returning members as active participants</i>
<i>Executive committee</i>		<i>Set precedence for ongoing board development</i>	

## MEETING DESIGN

Time	Activity	Who's in charge?	Needs Arrangements
9:00	<i>Negotiate expectations for morning – this board as a unit – new for all</i>	<i>President</i>	<i>Tentative agenda on chart paper</i>
9:10	<i>Why are we here? What is our purpose? (consensus experience)</i>	<i>Member of orientation planning committee</i>	<i>Questions sent in advance Constitution as reference</i>
9:30	<i>Individual sharing in triads My personal expectations as board member are . . . The skills I bring are . . . (Listening skills)</i>	<i>Member of orientation planning committee</i>	<i>" "</i>
9:45	<i>Large group sharing of triads (Build community)</i>	<i>Member of orientation planning committee</i>	
10:00	<i>Picture our organization (gather data – brainstorming)</i>	<i>Returning board member</i>	<i>Chart paper pens</i>
10:15	<i>Questions, discussion of Constitution, budget process, etc. (Orientation packet)</i>	<i>Officers</i>	<i>Orientation packet</i>
5 min. Break			
10:45	<i>Goal setting for year</i>	<i>Orientation planning</i>	<i>Chart paper</i>
12:00	<i>Review of committee structure orientation to committees</i>	<i>Committee chairpersons</i>	<i>Work within committees</i>
	<i>Lunch &amp; socialization</i>		

**FOLLOW UP** — Who is responsible?

Written orientation materials needed:

Before Meeting — *Orientation packet*

During Meeting —

After Meeting —

# Worksheet # 12

## Orientation

Who will be attending?

What are their needs and expectations?

What do we want to have happen?  
OUTCOME

How can we make it happen?

--	--	--	--

*MEETING DESIGN*

Time

Activity

Who's in charge?

Needs Arrangements

--	--	--	--

*FOLLOW UP* — Who is responsible?

Written orientation materials needed:

Before Meeting — *Orientation packet*

*During Meeting* —

*After Meeting* —

# Interview and Placement

The range of placement procedures in volunteer programs today spans from:

<i>Least Effective</i>	to	<i>Most Effective</i>
Advertise a job title		Assess needs that can be met
Wait and hope for a response by a volunteer		Develop a job description
Take whomever volunteers and be glad to have a warm body		Develop a screening process
		Recruit
		Interview and make a decision based on mutual needs
		Placement

The results of effective placement are significant. Program goals can be better met if volunteers are working in positions they're capable of handling well. Supervisors can anticipate constructive work relationships when they've contributed to the placement decisions. Supervisors' jobs are supported, not obstructed. Volunteers can expect their needs to be met and can feel comfortable that they have the ability to do the job.

Making time to screen and place volunteers reinforces a commitment to both the job being done effectively and volunteer needs being met. If you, as a program manager, have ever faced the uncomfortable role of 'dismissing' or reassigning a volunteer, you know what a time and energy saver good placement is.

THE INTERVIEW AND PLACEMENT PROCESS is the responsibility of the volunteer program manager, but it can be delegated to others and coordinated by the manager. All or some of the following steps are included in this process:

1. Exchange of information — both written and verbal

The potential volunteer shares information with the manager

- \_\_\_ Vital statistics (address, phone, etc.)
- \_\_\_ Past work/volunteer experience
- \_\_\_ Interests and skills
- \_\_\_ Why decision to volunteer (values, expectations, motivations)
- \_\_\_ Time available

The volunteer program manager shares information with the volunteer

- \_\_\_ Screening process
- \_\_\_ Organization purpose, structure policies
- \_\_\_ Overview of volunteer program
- \_\_\_ What jobs are available
- \_\_\_ General expectations and limitations of volunteers

2. Discussion and clarification of the information: Give both the volunteer and the manager an opportunity to ask questions and make sure there is mutual understanding.

3. Initial screening, mutually accomplished

by the volunteer and the manager, narrows down the potential choices to a few jobs.

4. Have a second, more in depth interview with the potential supervisor (if the type of job, closeness of work relationship warrants it).
5. Placement — a negotiation of mutual responsibilities. The agreement may include a trial period and understanding of how placement is renegotiated when program or volunteer needs change. Using a written agreement offers the advantage of clarifying that terms are understood and agreed upon. If there isn't currently a job for a potential volunteer, try to refer that person to another program or a referral service, such as the Volunteer Bureau.

### Interviewing Suggestions

Try to establish mutual trust and understanding. This initial exposure to your organization/group can be good public relations, even if the potential volunteer doesn't find a job that fits his/her needs.

Information shared during the interview is always kept confidential. Let the potential volunteer know this.

Practice effective communication: Relay information clearly, have written information and visual aids to reinforce verbal information, listen and check that you are understood and that you understand. Good communication is two way.

Value each person, remaining non-judgmental except in relation to the persons ability to work within the organization and the positions available. Try not to make assumptions.

Look for both ability and willingness to do a job. Be alert to whether or not the person's values are compatible with the

values of the organization.

Encourage the interviewee to do the talking by using open ended questions, such as "What made you decide on this organization?"

Keep the conversation moving without losing sensitivity to the interviewee.

Share enough of yourself to put the interviewee at ease. He/she wants to know the people in the organization are real.

Be honest about the organization and job expectations and limitations.

Guide the volunteer to avoid overextending. Enthusiasm may cloud his/her ability to make a realistic decision. It's better to start slowly, then add hours and responsibilities after a trial period, if the volunteer still wants to make a bigger commitment.

Don't talk a volunteer into something he/she really doesn't want to do.

### What to do if a placement doesn't work out . . . for the volunteer or for the organization.

You've expended a great deal of energy to prevent problems, so hopefully this won't happen. It is still possible. Action has to be taken, so first get the facts. Talk to the people involved. What really is the problem? Has there been a misunderstanding between people? Have the volunteer's needs changed? Or didn't the volunteer really have the ability or willingness to do the job?

Do some problem solving with the people involved. Include the volunteer and the supervisor when that is appropriate. The easiest solution, if it will alleviate the problem, is to offer further *training*. If that doesn't help, you may have to *transfer* or *terminate* the volunteer. Decide together the options that are acceptable.

Is there another job within the organi-



zation that would constitute a better placement? Is there another organization that would better meet the volunteer's needs? If so, help make the transfer happen comfortably.

Perhaps the volunteer is not able to continue volunteering because personal needs have changed. It is important to terminate as positively as you're able; a certificate of appreciation might be in order.

If other people are aware of the initial problem, you may need to prevent rumors. Provide enough information, only to those immediately involved, to stop speculation and yet completely respect the rights and privacy of all people involved.



1. Every potential volunteer in the Resident Home for Developmentally Disabled is individually interviewed, beginning with exchange of information in the volunteer office. Person is given pamphlet on the home, the volunteer handbook, and an application form. A brief two way discussion provides opportunity to determine interests and answer questions.
2. Tour of facility and informal discussion continues. Observation of responses, both verbal and nonverbal, is important.
3. Return to volunteer office. Every volunteer is asked "Why do you want to volunteer here?" and compatibility with the purpose of the volunteer program determined. If interest and compatibility exist, individual is given options of available positions, mutually placed in order of preference.
4. Second interview takes place with potential supervisor.
5. Volunteer coordinator makes temporary placement.

## EXAMPLES: Screening and Placement



1. Have a 'Volunteer Sunday' each May, September, January. Distribute Volunteer Opportunities Information sheets and application forms.
2. Managers of volunteer programs are available in Church Hall after services to discuss program needs and volunteer interests with potential volunteers. Volunteers can be placed at this time if an indepth interview is not necessary. (Chairperson of volunteer activity contacts new volunteer within one week)

or

3. Make a mutually agreed upon appointment for an in-depth interview. (Teachers, for example, will want to see materials, understand the program before making a commitment)
4. Volunteer Committee Chairperson makes ongoing screening and placement interviews available as new volunteers enter the programs.



1. First week in September: sponsor orientation and get acquainted sessions on two mornings; Send home job descriptions to all families.
2. Second week of school: For 3 days offer appointments ½ hour after school starts and ½ hour before students are picked up.
3. In each screening interview, review application and volunteer information sheet. Review orientation materials if potential volunteer was unable to attend. Discuss volunteer expectations: for example, desire to work directly with students or not.
  - a. If no desire to work directly with students, place in position such as craft, typing, fundraising. Chairperson or supervisor will contact within one week.
  - b. If individual does want to work with students, check: Is interest in small or large groups, or with individual students; Types of involvement preferred and capable of handling; Age group preferred; Desire to be in own child's classroom or not. Clarify that placement must correspond to teachers needs and requests, as well as with volunteers.
5. Refer to teacher or other supervisor (media center, library) for interview, then if mutually acceptable, a 4 week temporary placement with reevaluation at that time.

# Worksheet # 13

## Interview And Placement

Goal: Clarification of current or future . . . Interview and Placement

Suggestions: Record any process steps that exist at this time. Add additional steps desired, using this worksheet as a planning guide.

OUR ORGANIZATION SCREENING PROCESS IS. . . .  
(describe briefly)

INFORMATION WE FEEL NEEDS TO BE EXCHANGED INCLUDES:  
(check which apply to our program)

Potential volunteer shares this information with the manager

---

- Vital statistics (address, phone, etc.)
  - Past work/volunteer experience
  - Interests and skills
  - Why decision to volunteer, values, expectations
  - Time available
- 
- 

Volunteer program manager shares this information with volunteer

---

- Screening process
  - Organization purpose, structure, and policies
  - Overview of volunteer program
  - What jobs are available
  - General expectations and limitations of volunteers
- 
- 

OUR (WRITTEN) AGREEMENT INCLUDES:

The volunteer agrees to. . . .

- Accept job responsibilities and limitations
  - Accept guidance of manager and supervisor
  - Follow policies of organization and understand the structure
  - Participate in training
  - Notify of absense or termination
- 
- 

The organization agrees to. . . .

- Provide supervision
  - Provide orientation & training
  - Provide work conditions that are the same as any paid staff
  - Provide liability insurance
  - Evaluate volunteer performance and share evaluation with volunteer
- 
-

# Training

Effective training helps people volunteer and benefits all those who work with the volunteers. A volunteer who understands a job and develops needed skills is better prepared to:

1. experience job satisfaction,
2. work independently and assist supervisors in their jobs, and
3. provide greater benefit or service to the program.

Several types of training opportunities can be offered.

In *Preservice* training, the basic knowledge and skills needed before starting a job are presented. These include task responsibilities and limitations, general information on how to do tasks, and where things are located that are needed for the job. People are anxious to get started on a job, so pre-service needs to involve a time commitment that adequately prepares the volunteer, yet involves him or her as soon as possible. For some tasks, it could be an extension of the general orientation.

*Inservice* training objectives offer opportunity for more specific understanding of tasks and how interrelationships occur. On the job training and ongoing skill development encourage growth. Inservice should be designed to meet the ability and skill level of the volunteer as much as is possible.

*Continuing Education* opportunities are the general interest topics that don't necessarily relate to a specific job. These

do relate to the general purpose of the organization. Ideas for continuing education and career development can come from volunteers and the management team.

*Training for supervisors* enables those working with volunteers to increase their supervisory skills and offer more effective training for the volunteers.

It is the responsibility of the volunteer program manager to make sure that training is planned and ready to be offered to volunteers before they begin their involvement.

Learning objectives *state what you want to accomplish*. These objectives need to be possible to achieve, specifically stated, and measurable. The organization has a responsibility to set minimum expectations for each position. Then it has to be decided how the learner (volunteer) can move from where he or she is to where the trainer wants him or her to be. It is important that training expectations be realistic for the job. If too much is asked in proportion to the amount of skill or knowledge needed, volunteers may judge the training to be irrelevant and resent giving their time. If too little training is offered, the job may not be accomplished.

There is no job so simple or unimportant that some preparation wouldn't be constructive. I recall my first volunteer commitment in my children's school. I was asked to phone people and ask that they donate party refreshments. The parents I called were so happy to receive a call from the

school or a representative from the school, that they asked me questions and shared their concerns. As a new parent, I wasn't even prepared to redirect them to someone who could help. I could have been more effective with just a little training and some minimal information about where to refer questions.

Even the best qualified volunteer can be more effective with some training. Each setting is unique and each program year is different. For example, an experienced teacher may not see the need for training to work with children in a particular volunteer program. Perhaps little training is needed, but the uniqueness of a position includes working as a team member in a particular setting. The amount of learning needed does vary according to difference in background and past experiences of each volunteer. However, when large numbers are involved in a training session, needs of the majority have to be addressed. Individualized needs have to be met at a different time.

### Instructors

While the manager of the volunteer program does oversee volunteer training, it is unlikely one person has the time or ability to do it all. Supervisors, committee chairpersons, and people responsible for a program project are accountable for what hap-

pens in their areas of responsibility. They are best qualified to actually do training for their specific jobs, or to delegate that training to someone else. Experienced volunteers can gain personal and leadership growth when accepting training responsibility.

Capable people within your organization can present continuing education. You might also invite a speaker or facilitator from outside your organization to offer training. Adult school, community based continuing education programs, and other organizations that share your interests may have talks or workshops that would enrich your volunteers and staff.

Perhaps you can post a master calendar which includes preservice, inservice, and continuing education opportunities within your organization and in the community. Then the volunteers can take some initiative in planning what they want and need for their own enrichment, beyond the minimal and ongoing expectation for each job.

### Content

Content of training depends upon the task to be done, the situation where the volunteer is to work, and other variables. Training may focus on a combination of skills, knowledge, attitudes, and values.

These examples are not all inclusive, but demonstrate the variety of content for the same position.

<u>Position</u>	<u>Skills</u>	<u>Knowledge</u>	<u>Attitudes and Values</u>
Counselor (for a crisis intervention program)	Communication	Client needs Program goals	Sensitivity & respect for individuals
Newsletter editor (for any org./group)	Writing Run office machines	Of organization & community	Excitement about program
Team parent (youth recreational sports)	Communication Finding parents at home	Time & place of practices & games	Perseverance Sense of humor

How do you determine content and amount of training for each position? Some input is received with the job development information that was requested from supervisors and current volunteers. Specific training needs also are determined by reviewing volunteer program records and past training evaluation forms. Input from those people directly working with the volunteers can be requested. Then decisions on content can be finalized by the trainer.

### **Timing**

Time limitations exist for everyone. Whenever possible, plan training at a time the volunteers are already on site. A working coffee break may provide opportunity for an inservice filmstrip and discussion. On the job training includes demonstrations by a supervisor or an experienced volunteer — with some information (“this is what I’ll do”) shared before the on the job training and discussion (“this is how it applies to you”) after the experience. Training doesn’t happen all at once. It is an ongoing process.

### **Method**

Training Volunteer Leaders, published by the Y.M.C.A., provides the following reflection for any potential trainer on “How Adults Learn . . .”

- “ . . . Adults learn when they have strong motivation for learning.
- . . . Adults learn when the experience is satisfying and is accompanied by feeling of success.
- . . . Experiences which foster a better self-image (and greater acceptance of self) are conducive to learning.
- . . . Learning takes place in a non-judgemental climate which is characterized by openness, empathetic understanding, acceptance, valuing, trust, and caring.
- . . . People learn more efficiently through having experiences than by such means as reading, listening to lectures, or watching movies.
- . . . Adults learn best when they can define their own learning goals.
- . . . The opportunity for experimental tryout behavior with feedback facilitates learning.

- . . . Adults need the opportunity to apply their learnings in a variety ways with feedback, and feedback on feedback.
- . . . The content of learning needs to be applicable and relevant to the participant’s back home group and situation.”<sup>10</sup>

The actual method of presenting information and experience depends upon the needs of the participant and the abilities and resources of the trainer. Diversity makes learning more enjoyable. Some options are ‘learning by doing,’ such as: experience on the job, simulated learning, discussion, and audience participation. Presentation methods include: lecture, filmstrips, video tapes, field trips, exhibits, and movies. Written materials and library resources offer extended opportunities for self directed learning.

### **Cost**

Training can represent a significant budget item in a volunteer program. If pre-service and inservice are done by staff, the training is a cost factor through the staff salaries. Outside trainers may volunteer, or often charge a reduced fee for nonprofit organizations. If a volunteer attends a community sponsored lecture or workshop that relates directly to his or her volunteer position, who pays the registration?

The value of well trained volunteers to your organization is an issue to be discussed. Your organization training policy is reflected in the volunteer program planning and budget. You can safeguard your investment. If training cost is high for a particular position, the expected time commitment is generally longer. You don’t want to train someone extensively who makes a short term commitment to your organization. A volunteer who is especially well trained can also train other volunteers.

# Worksheet #14

## Training

Goal: To design and coordinate training opportunities for volunteers.

Suggestions: After receiving input from others re: training needs for each position, develop learning objectives and plan for implementation.

POSITION _____ (general description)	CONTENT	TIME	METHOD	INSTRUCTOR
---	---------	------	--------	------------

Preservice — learning objectives

Inservice — learning objectives

POSITION _____ (general description)
---

Preservice — learning objectives

Inservice — learning objectives

GENERAL INTEREST CONTINUING EDUCATION  
Topic and Objectives



CONTENT

TIME

METHOD

INSTRUCTOR

POSITION – *Hospice Speakers Bureau*

Speak on hospice movement or related subj.

Preservice - Learning Objective  
*To provide basic background on hospice, purpose & functions*

*Purpose & goals  
Services offered  
Funding sources  
Staff-paid & volunteer*

*2 hour evening session*

*Written packet for review prior to session  
Discussion*

*Ch. Speakers Comm.*

Inservice-Learning Objective  
*To observe presentation and assist speaker prepare for being primary speaker*

*General intro to hospice  
Debriefing on group response after presentation*

*Depends upon request  
Mutually negotiated time*

*Observation  
Involvement as ready*

*Experienced speaker*



POSITION *Church Census Volunteer (Door-to-Door)*

Preservice

*Basic communication skills (being nonjudgmental, effective listening)*

*Census process  
Church schedule & other info*

*Sat. a.m.*

*Role Play listening exercise*

*Ch. Census project*

Objective of census  
*What info needed - how to answer questions*

*Discuss written info*

Inservice

*Field experience*

*Work with experienced home visitor*

*Negotiated 2 weeks*

*Observation*

*Volunteer*

Support group

*Caring/reinforcement  
Continuation of preservice objectives*

*Discussion of experiences*

*after 2 week exp.*

*Informal discussion*

*Ch. census project*



POSITION - *Teacher Aide*

*Assists teacher one morning a week by working with individual student or a small group*

Preservice

*To become acquainted with teachers approach, volunteers contribution  
Class observation*

*Outline of curriculum  
How class functions*

*45 min. after school*

*Written materials  
Discussion*

*Teacher*

*Watching volunteers in action*

*One morning*

*Observation*

Inservice

*To develop tutoring skills in reading/math  
To expand communication skills*

*Reading/math activities  
Background-how children learn*

*6 weeks working "coffee" break*

*Experiential exercises  
Written material*

*Teachers  
Vol. Coord.*

# Supervision

Remember the very first question in this workbook, "Why have volunteers?" One given of volunteer involvement is that it takes time and energy to keep a volunteer program functioning. The supervisors of volunteers are people who give that necessary time and energy. Supervisors include project chairpersons and people who have volunteers working in their particular departments or areas of responsibility.

There have to be benefits for the people who supervise. What are the results of supervising volunteers? Is something accomplished for the program and/or is the job of the person supervising expanded or

enhanced?

The supervisor deserves to see an overview of how his or her role fits with the volunteer program manager and with the volunteers. It is difficult to define a supervisor's responsibility unless the volunteer program manager's responsibilities are also clear. The management functions reviewed in Section II can be negotiated to clarify role expectations. The primary responsibilities vary in each program depending upon the program needs and personnel available. The following division of responsibilities provides a workable example.

## ROLES/RESPONSIBILITIES RE: VOLUNTEER PROGRAM MANAGEMENT

Management functions	Volunteer Program Manager	Supervisor of Volunteers
Planning	Shared	Shared
Job Development	Shared	Shared
Recruitment	Primary	Supporting
Orientation	Primary	Supporting
Placement	Primary	Supporting
Training (preservice and inservice)	Supporting	Primary
Supervision on job	Supporting	Primary
Record keeping	Primary	Supporting
Evaluation	Shared	Shared
Recognition (formal)	Primary	Supporting
(informal)	Supporting	Primary

In the example, "Roles/Responsibilities re: Volunteer Program Management," the volunteer program manager has primary responsibility for the program and accountability to the organization. The supporting responsibilities of the program manager are availability for trouble shooting and providing assistance as requested, particularly when the supervisor is new to the job.

The primary responsibility of the supervisor in the example relates to the specific volunteers he or she supervises. Supporting roles include: being aware of the total program, perhaps being introduced at the volunteer orientation, being able to direct an interested potential volunteer to the program manager for recruitment information, keeping minimal records of time spent as supervisor, and saying a friendly thanks. Planning and evaluation are shared functions, because the supervisor has information only he or she can contribute.

Volunteers also need to understand the responsibilities of the volunteer program manager and the supervisors: who makes the initial contract with the volunteer, to whom does the volunteer report, where does the volunteer take questions or concerns.

Mutual expectations between the volunteer program manager and supervisors may change as the program changes. Plan for change by making time to communicate and clarify expectations, perhaps mid year. Then renegotiation is more likely to occur before problems or misunderstandings arise.

### **Attitudes**

Basic attitudes toward volunteer involvement are key to successful supervision. If a volunteer is placed where he or she isn't wanted, the likelihood of either vol-

unteer or supervisor being satisfied is minimal. If a supervisor is convinced volunteers won't be any help and consequently doesn't plan work for them . . . things won't go well. History influences current attitudes. Even one really negative experience with a volunteer can make a supervisor wary.

Supervisory skill doesn't compensate if negative attitudes exist toward volunteer involvement. If it is possible, don't assign volunteers to supervisors who don't want to work with volunteers. However, attitudes can change. A supervisor may see someone else work effectively and be open to trying at a later date, particularly if not pushed. If volunteers are going to be used for the first time in a program, ask for supervisors willing to pilot the program. People with positive attitudes will likely come forth. A successful model is the most convincing way to validate how worthwhile volunteers can be.

### **Skills**

Supervisors use the same skills in working with volunteers that are used in supervising paid personnel. These skills can be developed or expanded with training. There is an added dimension in working with volunteers . . . they don't have to be there. Interactions are vitally important. Ideally all people working together respect the value of others. Realistically that doesn't always happen. The payoff for volunteers is totally related to job satisfaction, both the task being done and human relations needs being met. This doesn't mean volunteers aren't open to constructive criticism, direction, and limitations when presented in a caring fashion, with reasons for 'why.'

The following skills are useful to supervisors:

*Organization* involves having work

ready for the volunteer, being able to accomplish his or her own task, coordinating and guiding the work of others, and using time effectively.

*Communication* includes making oneself understood, listening to verbal and nonverbal communication, obtaining information, and making time to communicate effectively.

*Delegation* includes activating others, being able to share responsibility and being open to the ideas of others.

*Training skills* include understanding how adults learn, being able to relay information and model skills, facilitating group learning.

*Team development* involves skills in group planning and evaluation, being caring and enthusiastic, effectively developing and maintaining work relationships.

If volunteer involvement is new to the organization or if a person has no supervisory experience, opportunities for supervisors to acquire skills should be offered before volunteers are placed. Ongoing training for supervisors will contribute greatly to the quality of the program.

### **Roles/Responsibilities of the Supervisor and the Volunteer**

A contract between the supervisor and the volunteers clarifies expectations among the people who work together. Some responsibilities are determined by legal requirements, accountability of paid staff, or because the supervisor has special training. Other tasks could be done by either supervisor or volunteer. All parties will work more effectively if the division of responsibility is defined and understood.

### **Looking at Your Own Program (Suggestions for using Worksheet #15)**

A team effort among the volunteer program manager and supervisors is the most constructive approach when using the following worksheet or parts of it.

1. ROLES/RESPONSIBILITIES – First, the manager and supervisors agree as to which of the management functions exist and/or are important to the program. Then discuss each and reach consensus on who has shared, primary, or supporting responsibility.

2. SELF EVALUATION FOR THE SUPERVISOR – The ATTITUDES section must be presented in a nonjudgmental way. It has to be all right that some people do not want to work with volunteers. Then it's acceptable to ask the supervisor: to give working with volunteers a try if mandated, but offer support; to wait on volunteer placement and re-evaluate later; or . . .

The SKILLS section is purposely not defined on the worksheet. The volunteer program manager can initiate discussion with supervisors on what they feel these skills involve. This exercise is intended to offer support and encouragement to those supervising, not to intimidate. If the supervisors identify skills that they need, they will perhaps be open to receiving inservice on how to more effectively work with volunteers.

3. CONTRACT BETWEEN SUPERVISOR AND VOLUNTEERS – If supervisors want to use this exercise with the volunteers in their areas of responsibility, you may want to discuss with them how to involve volunteers. You've already modeled the process when negotiating the supervisor's roles/responsibilities.

Negotiation of supervisor, volunteer tasks



Setting: Volunteers in Probation

Tasks	Supervisor (Case worker)	Supervisor & Volunteer	Volunteer (recreation)
Review Case – Evaluate overall needs and progress	X	X (as relates to recreation)	
Plan recreation options		X	
Purchase supplies			X (reimbursed)
Decide when client will attend recreation	X		
Facilitate recreation activity			X
Evaluate effectiveness		X	



Setting: Adult education program

Tasks	Supervisor (Director of Rel. Ed.)	Supervisor & Volunteer	Volunteer (Adult Ed. Leader)
Plan overall adult Education program		X (with other leaders & church input	
Decide specific content		X (with participants)	
Order supplies	X		
Lead Group			X
Keep records # of participants evaluation of program			X
Participate in overall evaluation of adult education		X	



Task	(Playground Supervisor)	Supervisor & Volunteer	Volunteer Aide
Work with small group activities		X	
Handle discipline	X		
Supervise craft activity			X



# Record Keeping

Too many volunteers start a job with plenty of energy, but little record of past volunteers' successes and mistakes. It doesn't take long to become discouraged when energy is wasted figuring out what the job really is. The same mistakes may be repeated. Then the volunteer, at the end of the job commitment, lacks energy to leave helpful records. And the cycle repeats itself.

*Records of volunteer program management* are needed in addition to general records of the organization. These include:

New volunteer information — enrollment

Records of volunteer work performed:

Type of work, hours worked, training attended, and performance evaluation (estimating volunteer program time and impact in monetary terms is illustrative and dramatic . . . hours of volunteer work at even minimum wage represents a sizable sum.)

Effect of volunteer involvement:

Numbers served and types of service, changes, influences; Public relations through volunteer involvement

Management records — how the volunteer program was accomplished (or not accomplished):

Planning and evaluation information, copies of forms and flyers, budget, insurance forms, how management functions were implemented (job definitions, training, etc.)

*Record keeping pitfalls to avoid* are:

Elaborate and incomprehensible statistics

Outdated and useless card files

Duplicate forms and records

Unnecessary information recorded

Records scattered among too many staff and committee members

*To eliminate these pitfalls:*

Evaluate annually what information is still practical and really used

Determine whether questions on forms are pertinent, brief, and understandable

Have a central file location and efficient procedures  
Keep accurate records that provide continuity of program

Never let the last copy of any report or record leave the office — make copies

Any record that involves personal information must be kept confidential, unless its release is requested by the individual, such as a letter of recommendation.

When information is requested for program evaluation, records of compiled information need to be cycled back to the program participants who gave input.

Some records may be legally necessary. Any injuries must be carefully recorded in the manner determined by the insurance the organization carries for volunteers. Internal Revenue Service mileage deductions must be available for audit.

Effective record keeping prepares the organization to document the value of helping people volunteer. Volunteers may ask:

If what I do isn't meaningful to me  
and

If the organization goals aren't affected. . . .

WHY VOLUNTEER?

# Worksheet # 16

## Record Keeping

Goal: To prepare an overview of what Record Keeping is relevant and how to obtain information

<i>INFORMATION NEEDED</i>	<i>WILL BE OBTAINED</i>	<i>BY WHOM</i>	<i>WHEN</i>
Check which information is needed in your organization/group			
Initial volunteer enrollment			
<input type="checkbox"/> basic: name, address, phone	<input type="checkbox"/> enrollment form		
<input type="checkbox"/> skills and interests	<input type="checkbox"/> placement interview		
<input type="checkbox"/> time available	report		
<input type="checkbox"/> person to notify in emergency			
<input type="checkbox"/> job preference			
<input type="checkbox"/> .....			
Volunteer work records (for individual volunteers)			
<input type="checkbox"/> hours worked	<input type="checkbox"/> volunteer sign-in sheet		
<input type="checkbox"/> training attended	<input type="checkbox"/> training records		
<input type="checkbox"/> type of work	<input type="checkbox"/> placement records		
<input type="checkbox"/> performance evaluation	<input type="checkbox"/> supervisors evaluation		
<input type="checkbox"/> .....			
<input type="checkbox"/> .....			
Effect of volunteer involvement			
<input type="checkbox"/> numbers served	<input type="checkbox"/> supervisor, volunteer		
<input type="checkbox"/> changes influenced	evaluations		
<input type="checkbox"/> total number of hours	<input type="checkbox"/> minutes from board meetings		
<input type="checkbox"/> .....	<input type="checkbox"/> publicity from media		
<input type="checkbox"/> .....			
Management records			
<input type="checkbox"/> volunteer program management plan	<input type="checkbox"/> periodic written evaluation		
<input type="checkbox"/> copies of all forms	<input type="checkbox"/> written report of meetings		
<input type="checkbox"/> recruitment flyers	<input type="checkbox"/> planning handbook		
<input type="checkbox"/> job descriptions	<input type="checkbox"/> manager's program reports		
<input type="checkbox"/> orientation manual			
<input type="checkbox"/> training content & attendance			
<input type="checkbox"/> recognition activities			
<input type="checkbox"/> program evaluation			
<input type="checkbox"/> .....			
<input type="checkbox"/> .....			

# Evaluation

It is a friendly gesture to ask a person how the day (or week) has been for him or her.

This same inquiry within a volunteer program, "How are things going for you," lets a volunteer know there is caring. Yet the need for evaluation extends far beyond a friendly gesture that's good for morale. It is a crucial component of the planning cycle to determine effectiveness and control quality, both of the program and for the volunteer. Evaluation helps you decide which management functions to maintain as they are and which to change. Evaluation is also a guide for the volunteer's personal growth.

Evaluation must be written into any plan. It may not happen automatically. Clear objectives need to be based on the organization purpose and should indicate how you'll receive feedback on. . . .

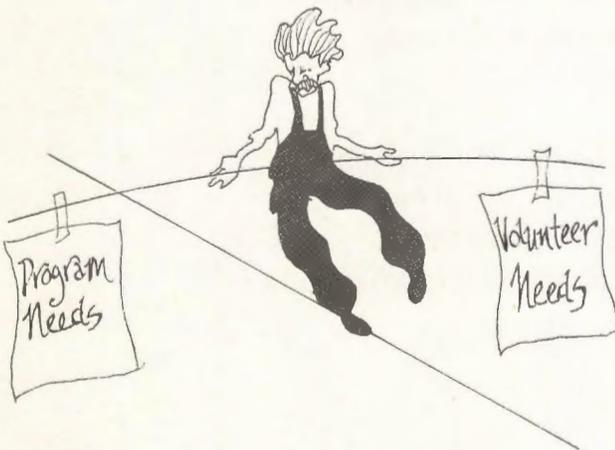
Volunteer program evaluation can be measured. . . .

- . . . by the organization objectives that are accomplished by volunteers
- . . . through records of the services made possible by volunteers
- . . . by the amount of money raised through volunteer projects
- . . . by checking objectives accomplished in specific volunteer management functions
- . . . through records of volunteer performance

However, not all that is accomplished will surface just by examining the organization objectives and other concrete information. The effect that volunteers have on the community when they represent the program to others is harder to measure. It's important, too. One way of obtaining subjective evaluation is to listen to the feelings volunteers have about the organization and their experience.

## Who Evaluates

Ideally, everyone has something to contribute to evaluation; the executive (director, president), supervisors, volunteers, program participants, and certainly the volunteer program manager. Realistically, the people involved in evaluation will be those who have input to give and are willing to share it. The chief executive or administrator is accountable to funding sources and will automatically participate in funding



evaluation related to the volunteer program. The supervisors are the most knowledgeable evaluators for volunteers because they work with them. Volunteers are the recipients of management benefits and know how effectively the program runs, so are qualified to evaluate volunteer program management. Involving program participants (those receiving service or benefits) in evaluation makes them aware of volunteer program dimensions and adds to evaluation.

### **'How To' Evaluate**

Evaluation can be both formally requested and informally heard. Written surveys and scheduled conferences can be designed to gather information. The simpler the form is to complete, the more likely people will be to use it. Interviews that serve as evaluation are most effective if a non-threatening and nonjudgmental approach is assumed. Incorporate some method of recording verbal evaluation, so it won't be lost. Informal evaluation takes place whenever good listening skills are practiced in an open atmosphere. People are usually happy to give their opinions. Opportunity for anonymous criticism can be provided through a suggestion box or. . . .

### **When To Evaluate**

Evaluation forms are typically distributed at the end of the program year. Don't forget midpoint evaluation during the year to determine if what you're doing is on target. Find out if objectives will be met while there is still enough time to redirect your efforts. You want to have accomplished what you planned. During a meeting or during the time people volunteer is a good time to elicit evaluation information. Forms sent in the mail or taken home are too easily forgotten. Evaluation of orientation or train-

ing sessions, for example, are integrated into the session for immediate feedback. Likely times for interviews with volunteers are: at placement, when effectiveness of recruitment and orientation can be checked out; meetings with supervisors; exit interviews as a volunteer leaves or changes jobs.

### **What's Done With The Information?**

Information shouldn't be gathered and forgotten. If people give their feedback and their ideas, they expect something to be done with the data. Evaluation verifies whether or not objectives have been met, gives justification for budget, and provides information to the funding source needed for accountability. Evaluation information that is shared provides education about the program.

Evaluation is an integral component of the planning cycle both for the general organization goals and for the volunteer program management planning.

In this workbook, the opinion survey (Where are we right now?, p. 40) is an evaluation instrument. A shorter questionnaire, one for volunteers and one for supervisors, follows (Worksheets 17 & 18). The shorter questionnaire has just one question on each management function and is a very general indicator of volunteer program management effectiveness. If used at the end of the program year, information provides input for next year's planning. It could also be used midyear, after the program has been active for several months. Ongoing evaluation during the year can be accomplished through interviews or other evaluation tools.

# Worksheet # 17

## Evaluation — Management

Goal: To obtain Volunteer Program Management Evaluation By Management Team

Suggestions: Check your response re: the effectiveness of volunteer planning and implementation. (1-no, 5-yes)

### PLANNING

Did you feel you had adequate opportunity to contribute to planning?

No	Yes
-----	
1 2 3 4 5	

Were you aware of and satisfied with the finished plan?

-----	
1 2 3 4 5	

### IMPLEMENTATION

Did the job description reflect what was needed on the job that you supervised?

-----	
1 2 3 4 5	

Did you have the numbers and types of volunteers that you needed?

-----	
1 2 3 4 5	

Were you aware of when orientations were held for volunteers and staff and what information was presented?

-----	
1 2 3 4 5	

Were the volunteers placed with you the right people for the job?

-----	
1 2 3 4 5	

Was adequate preservice and inservice training received by the volunteers you supervised?

-----	
1 2 3 4 5	

Did you have enough preparation and time to be an effective supervisor?

-----	
1 2 3 4 5	

Were the records you were asked to keep relevant and did you receive feedback on accumulated information?

-----	
1 2 3 4 5	

Was opportunity to give input on how the program was functioning available during the year?

-----	
1 2 3 4 5	

Did you feel that volunteer efforts benefited the organization and that you found ways to express appreciation to volunteers?

-----	
1 2 3 4 5	

THINGS I PARTICULARLY LIKED ABOUT WORKING WITH VOLUNTEERS THIS YEAR WERE:

THINGS I'D LIKE TO SEE CHANGED IN THE VOLUNTEER PROGRAM ARE:

(Use the back of this form for comments on any of the above questions or statements)

# Worksheet # 18

## Evaluation — Volunteers

Goal: To obtain Volunteer Program Management Evaluation By Volunteers  
 Suggestions: Check your response re: the effectiveness of volunteer planning and implementation. (1-no, 5-yes)

**PLANNING**

Did you feel you had enough opportunity to contribute to planning?  
 Were you aware of and satisfied with the finished plan?

No	Yes
1 2 3 4 5	1 2 3 4 5

**IMPLEMENTATION**

Did the description of your job represent what needed to be done?  
 How did you learn about this volunteer opportunity?  
 \_\_\_ pamphlet \_\_\_ newspaper \_\_\_ from another volunteer  
 \_\_\_ other source \_\_\_\_\_

1 2 3 4 5

Did your orientation provide a basic introduction to the organization — its purpose and how it functions?

1 2 3 4 5

Did you feel your job utilized your talents and satisfied your reasons for choosing to volunteer?

1 2 3 4 5

Did preservice training prepare you to start your job and inservice provide opportunity for ongoing growth?

1 2 3 4 5

Did you feel that adequate supervision time and energy was available to you?

1 2 3 4 5

Were the records you were asked to keep relevant and did you receive feedback on accumulated information?

1 2 3 4 5

Was opportunity to give input on how the program was functioning available to you during the year?

1 2 3 4 5

Did you feel people in this organization acknowledged and appreciated your volunteer contribution?

1 2 3 4 5

THINGS I PARTICULARLY LIKED ABOUT BEING A VOLUNTEER THIS YEAR ARE:

THINGS I WISH HAD BEEN DIFFERENT ARE:

(Use the back of this form for comments on any of the above questions or statements.)

# Recognition

Recognition is not just a way of saying thank you, but a response to individual interests and reasons for being involved. It happens fairly automatically in a well managed program, particularly if the atmosphere is friendly. Every volunteer appreciates a smile from the volunteer manager or staff member.

People have varied and changing motivations. The volunteer program manager and supervisors will likely hear what's important to the volunteer if communication is open and if listening is carefully practiced. Here are some ways of showing appreciation as they could be linked to different motivations.

## Achievement

- Write a letter of recommendation with accomplishments identified in terms that can be used in business

- Provide Training opportunities that encourage personal growth

- Send a letter of appreciation to employer

## Challenge

- Involve in problem solving
- Use in emergency situation

## Creativity

- Invite ideas re: their own job placement
- Put up a volunteer suggestion box
- Listen to volunteer ideas

## Independence

- Provide interesting job opportunities
- Offer good orientation and training
- Provide opportunity to work without close supervision
- Let trustworthy volunteers know you trust them

## Interest

- Carefully match volunteers and jobs
- Sponsor attendance at community based workshops
- Avoid routine task assignments

## Leadership

- Ask to help with training other volunteers
- Put in charge of project
- Invite to participate in planning and evaluation

## Recognition

- Have 'volunteer of the month' on bulletin board or in newsletter
- Submit name for community level volunteer award
- Give certificate of appreciation at annual ceremony

## Security

- Plan carefully — have task materials ready
- Say we missed you when absent
- Have name tags for volunteers

## Self Expression

- Invite volunteer to fill out interest and talent inventory
- Utilize unique talents and interests
- Keep environment receptive to

volunteers taking initiative

#### Service

Letters of appreciation from the people who are helped in the program (example, school children)

Keep records of ways and numbers of people helped by the volunteer program and publish information

Provide training that enables volunteers to make a meaningful contribution

#### Socialization

Have get acquainted staff and volunteer gathering

Provide area for volunteer lounge and coffee

Sponsor a holiday party for volunteers

#### Variety

Place with creative, responsive supervisor (and prepare supervisors to be creative and responsive)

Make sure job change is an option

Check to see how things are going

Most of these ideas respond to a variety of motivations. This outline only suggests how the recognition and motivation can be linked.

In general, the staff is more concerned about the need for formal recognition than the volunteers are. Too much recognition effort is an ineffective as too little. Most volunteers find greatest satisfaction when they know what they're doing is helping others. If a great deal of energy is obviously being directed toward recognition, volunteers may even feel it detracts from meeting program needs.

At the end of the program year, 'formal' thanks serves to remind staff, clients or program participants, and volunteers how important the volunteer program is. It's human nature to let positive things be taken for granted. This goes back to the question, "Why have a volunteer program?" Part of recognition is . . . celebrating advantages.

Giving recognition does demand a time commitment, but only a few defined recognition activities are needed in a well managed program. Effective management is one dimension of recognizing the value of volunteers. Examples of the relationships between recognition and existent management functions, which apply in any program, include:

#### *Management functions*

JOB DESCRIPTIONS

RECRUITMENT

ORIENTATION

PLACEMENT

TRAINING

SUPERVISION

RECORD KEEPING

EVALUATION

#### *Recognition*

Volunteers deserve to know what a particular position entails

Purpose and goals are honestly represented

Importance of volunteers and how they fit into the big picture is defined

Each volunteer is interviewed-needs & interest are taken into consideration

Personal growth is encouraged

Volunteers aren't asked to work without appropriate support

— Supervisors have inservice on how to work with volunteers

Skills, training, hours validated in Certificate of

Achievement (see p. 84)

Formally every Jan. and May; Offered to volunteer

— we're open to helping volunteers grow;

Asked of volunteer — states volunteers insights are valuable

CERTIFICATE OF ACHIEVEMENT

This is to certify that

---

has attained the related skills and proficiencies  
as indicated on the reverse side  
in a voluntary placement at

---

Presented by

---

Information on the reverse side could include:

Skill Recognition (acquired or demonstrated):

Training attended:

Length of time at organization:

Description of agency/organization:

Number of hours served:

Supervisors comments:

---

The following are examples of planning guides for other recognition activities beyond effective management:

YOUTH RECREATIONAL SPORTS

<i>TIME OF YEAR</i>	<i>ACTIVITY</i>	<i>WHO IS RESPONSIBLE</i>
Mid season	Honorteam parent at a game—let players come up with an idea . . . bring a special chair, refreshment, place of honor, rousing cheer (by now the team parent may be developing a callous from phoning & needs a boost)	Coach
Special events	Board or planning committee given ribbon to wear at opening ceremony or meeting "I'm appreciated by parents & kids of City Youth Sports League (these unsung heroes seldom receive anything but complaints)	The person Responsible for volunteer mgmt. (If there isn't anyone, perhaps having someone could promote better management <i>and</i> wider participation)
End of program year	Publish in parent newsletter by midseason "Ideas on how to say thanks" . . . to the coach, team parent, etc. (ask 'veteran' parents what has been meaningful—new parents may just feel lucky to keep up with season schedule and not think ahead). Example: T-shirt printed with 'Coach of the year'	Newsletter Editor



# Worksheet # 19

## Recognition

Goal: To plan recognition of our program volunteers.  
Suggestions: Use samples as a guide.

### RECOGNITION PLANNING CALENDAR

<i>Time of year</i>	<i>Activity</i>	<i>Who is responsible</i>
Monthly		

Mid-year  
(in program cycle)

Special events

End of program year

-----

What do we plan to do in the different management functions that helps us respond to volunteers diversified motivations?

- JOB DESCRIPTIONS
- RECRUITMENT
- ORIENTATION
- PLACEMENT
- TRAINING
- SUPERVISION
- RECORD KEEPING
- EVALUATION

Recognition examples continued:

<i>TIME OF YEAR</i>	<i>ACTIVITY</i>	<i>WHO IS RESPONSIBLE</i>
Monthly	Feature a different volunteer activity each month in newsletter (teachers, ushers, musicians, etc.). Monthly prayer breakfast for home visitors	Ch. of each volunteer activity-plan schedule for the year Ch. home visitors
Mid-year (of program cycle)	"Day to Pray and Grow . . . Together" Inservice in each program session-Spiritual growth experience by pastor or rabbi-Some input on next year's planning (pre-budget)	Pastor/rabbi Ch. of each volunteer activity
Special events	Commissioning-at a regular service Thanksgiving letter to the volunteers and their families	Pastor/rabbi Director, Religious Ed. Ch. of each activity Cosigned by pastor/rabbi
End of program year	A celebration for volunteers and spouses Letter of appreciation-citing achievements	Shared planning by all management
Monthly	Individual teachers meet with classroom volunteers (except Dec. & June) BYBB, Bring Your Own Brown Bag lunch; check how things are going	Teachers
	Volunteer of the Month in PTA newsletter	Volunteer Program mgr.
	Last week of the month refreshments in volunteer's lounge	Volunteer Program mgr.
Mid year (of program cycle)	Volunteer Conference - District Day for volunteers who attend and have follow-up sharing for all volunteers	Volunteer Program mgr.
Special events	Thanksgiving note from students	Teachers and VPM
End of program year	Appreciation coffee  Letters of appreciation	Teachers and VPM



# Helping People Volunteer

Helping the Volunteer  
Program Manager . . .

# Making Enough Time

(to manage volunteers effectively)

Now you have more volunteers and exciting plans to make your growing volunteer program more effective. If you're feeling you don't have time to make the new plans happen, this section is for you.

When I lived in the midwest, a consistent topic of conversation was the weather. The extremes, too hot or too cold, made even the beautiful days worthy of comment. I recall a point in time when the talk about the weather began to bother me. There wasn't much we could do to change the temperature, and there had to be more interesting things to discuss.

A similar discomfort began to emerge several years ago when I heard myself and many others complaining constantly about not having enough time. As wife, mother of four, and graduate student, I was really struggling to balance all my roles. One of my professors, Dr. Jim Schmook, presented an excellent workshop on time management, which helped me tremendously.

During this same period, I was facilitating volunteer program management workshops. Workshop participants expressed excitement about and willingness to implement management ideas. This was dampened by a deep frustration. "I can't do all the things I'm currently trying to do," was repeatedly expressed. Volunteers were feeling the same frustration about their limits. The managers heard willingness to volunteer, but people were feeling unable to make enough time to volunteer.

Jim generously gave his permission to share his approach in my workshops for volunteer managers, volunteers, and in this workbook. This section is included to help you move from "I don't have time" to "I choose to (or not to) make time for this." Making enough time to prevent problems can actually save time. Its easy to say "I just don't have control over my time." Someone or something controls our time. We can decide to regain control. If we feel we have some responsibility for our lives and the way we live them . . . then we need to be responsible for our time. How we use our time reflects how we value life.

Like the weather, there are responsibilities we have that can't be changed. The way we approach things can be altered. The challenge is deciding which of our current activities can be altered and are important enough to change.

In this workbook you're encouraged to look at what's happening now in your volunteer program, to decide what you want to change, according to your's and the organization's values and needs, and apply management to make changes that are possible. The same process applies to managing your time. You've looked at how you use your time, what is working well, and what you want to change. Now plan to control your time.

Your long term goals in life can influence the way you use time today. What are your personal goals? How does what you're

doing help you toward those goals? Does your present job contribute to education or career goals? KEEP RECORDS of what you accomplish even if you don't see a use for them at this time. A valuable use of time is doing life planning, either in a workshop setting or using a book like *What Color is Your Parachute* by Richard Bolles.

After identifying life goals, examine your unique energy level, responsibilities, and resources. There is a disservice many of us impose upon ourselves. We compare ourselves to other individuals who may have totally different energy levels, responsibilities, and resources.

Think about how much energy you have; your sleep, eating, and exercise patterns. These directly affect what you can do. Your energy level probably changes during the day. Plan to use the time that you're most mentally alert for creative thinking.

Responsibilities do change; long term, such as wage earning demands home and parenting needs; and short term, such as an illness in the family. Your time management goals and techniques need to be flexible. Time management isn't intended to add the frustration of trying to accomplish more, but to use time for what's most important to you.

One reference that is packed with helpful ideas is *How to Get Control of Your Time and Your Life* by Alan Lakein. He encourages effectiveness, not efficiency. Examples of his time management suggestions include:

Keep a "to do list," value the importance of each item (A, B, C) and work only on top priority — "A" projects.

Look hard at how you waste time and work to eliminate "time-wasters."

Reward yourself for accomplishment, especially the unpleasant tasks.

File things carefully, in a system that works.

Handle mail and incoming information only once.

Use the "Swiss cheese" approach — doing bits of a large project and not waiting until you have long periods of time to work.

Ask yourself, "Is this the best use of my time right now?" Lakein's law.

Time is a limited commodity. It can't be expanded, but it can be controlled.

It's unlikely that any of us resolve our time management problems because our needs and demands change. Planning how we use our time is an ongoing project that deserves top priority. If we're going to help people volunteer, we need personal resources of energy and time.

If something is really important, time must be set aside as a priority hour, not an extra hour. Extra hours just don't happen . . . . There are only 24 per day for each of us.

I see a close relationship between time management and volunteering. When time is uncomfortably tight, often the first things to be eliminated are the things that are voluntary. Many people have shared with me a sadness about giving up a volunteer activity that really meets their own personal needs. Perhaps your organization could offer a workshop or resources on time management that could free people to make a choice to volunteer. The volunteers and your organization would both benefit.

# Worksheet # 20

## How I Use My Time

My responsibility as volunteer program manager is:

- \_\_\_ a full time job - 40 hours a week
- \_\_\_ a part time job of approximately \_\_\_ hours a week
  - \_\_\_ as included in a job that involves other responsibilities
  - \_\_\_ in addition to another unrelated work commitment \_\_\_ hours a week
  - \_\_\_ in addition to the primary commitment of managing a family

Take into consideration the amount of time you spend managing the volunteer program and your other responsibilities. Then value each item according to how appropriate you feel the amount of time is that you spend. This covers your time as volunteer program manager, at home and leisure. Evaluation of other work commitments are not included. Check the column that represents what's happening now:

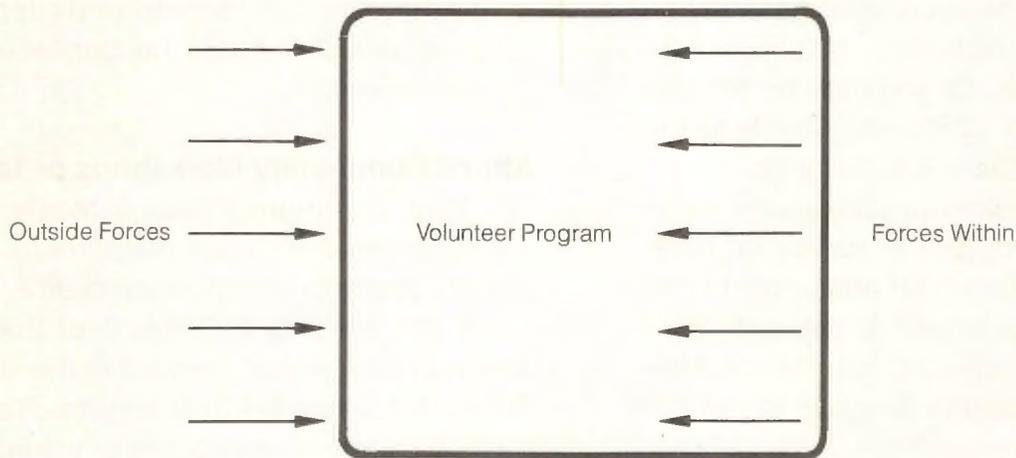
	TM = Too much	TL = Too little	JR = Just right	
VOLUNTEER PROGRAM MANAGEMENT				HOME AND LEISURE TIME
	TM	TL	JR	
Attending meetings				Commuting
Writing messages				Housework: Cooking, Cleaning, Laundry, Other
Talking to volunteers				Gardening
Answering phone calls				Attending meetings
Making phone calls				Talking with spouse/roommate
Writing memos				Talking with children
Talking with executive or president				Reading
Keeping records				Home repair projects
Coffee breaks				School/adult ed. classes
Talking with management team members				Outings with family/friends
Typing				Planning future time
Making good decisions based on data				Sitting and thinking
Counseling				Listening to radio
Planning projects				Entertaining
Idle chatter				Shopping
Scheduling my time				Prayer/meditation
Sitting and staring				Reading - newspaper, books
Writing reports				Watching TV
Talking with people receiving program benefits				Budget planning
Daydreaming				Exercising - general
Facilitating training				Sports - my favorite
Self-improvement classes, meetings				Eating meals
Evaluating volunteer program				Driving the car
				Visiting friends, relatives

How else do you spend your time? And is it too much, too little or just the right amount of time, considering your values and your diverse responsibilities. When you review your worksheet, look at those things that you feel take *too much* time. Which things can be changed? What do you want to change? There are activities you're spending *just the right* amount of time doing . . . give yourself credit! There is also *too little* time . . . for things you wish you could do. What about the project that has remained an idea, a dream. Or perhaps there is not time to just 'be.'

The first step in planning is to identify what you want to do:

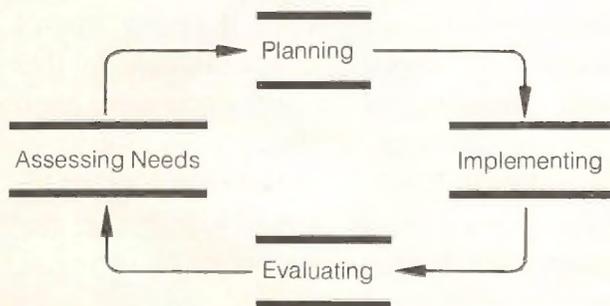
- WHAT DO I WANT TO CHANGE, AVOID?
- WHAT DO I WANT TO KEEP THE SAME?
- WHAT DO I WANT TO ADD, TO ACHIEVE?

# Where Do We Go From Here?



Your volunteer program is now different if you've planned and implemented changes by using Sections I and II. Of course, it would be different even without planned change. The forces influencing your program are not the same.

Let's assume that as you helped renew your program, you also planned to respond to change. The process is ongoing:



Ask the questions again. Why have volunteers? Have the advantages and disadvantages changed? What forces now influence the program? What skills do those who are currently responsible need in order to manage the program even better? Response to the survey question will be different. It's satisfying to see the progress made. But not everything could be accomplished the first time around!

What? Time to plan again! How does a year go by so quickly? And there will be new officers or board members. Perhaps membership has increased . . . or decreased.

This workbook doesn't presume to ask all the questions or have all the answers. It is intended to serve as a guide. There are other resources that you may want to explore as you ask, "Where do we go from here . . ."

## **Learn From Other Managers of Volunteer Programs**

By linking with other volunteer program managers, you can discover ideas that work. Hearing about what didn't work can also help you avoid similar mistakes.

Many organizations have national or state level conferences where people with like jobs meet. These conferences may already include workshops or talks on volunteer management. Or you may be the one who can suggest topics you identify as important or particularly challenging.

A visit to another organization can be very helpful. Through the survey on page 40, you've identified the management functions that you most need to improve. You'll be ready to seek specific information. How do you find an effective program to visit that has similar challenges?

- ✔ Check that the goals of the organization, size of membership, staffing (all volunteer or one staff member or a large paid staff), facility, etc. are similar to yours. At first glance an organization of dog breeders might not seem to parallel a square dance club. But these similarities exist: the group is all volunteer, members meet to share ideas and to socialize with people who are interested in the same things, and funding is member contributed. If you don't find a similar organization, locate a volunteer program that can provide adaptable information.
- ✔ Visit with a 'manager' of volunteers who is effective. You want to gather ideas that are effective. Good management is advertised by enthusiastic volunteers. I'd heard for almost a year about how much fun it was to work at our local museum of art. And when I met the woman who helped develop the program, I wasn't

surprised to see that she was a good manager.

- ✔ Another way to judge effectiveness is by growth (or decline) of a program. Numbers don't tell the whole story, but growth can be a clue that good things are happening.
- ✔ Ask someone who knows the volunteer community for recommendations of programs that could be beneficial for you to visit.

## **Attend Community Workshops or Talks**

Your community may already offer management workshops that directly or indirectly apply to volunteer programs.

There are over 250 Volunteer Bureaus and Voluntary Action Centers in the United States that, as part of their service, sponsor training events for managers of volunteers. The San Diego Volunteer Bureau training includes a one day workshop for new coordinators, specific half day or longer workshops on topics such as recruitment, training, and supervision. Annual volunteer conferences for managers and volunteers are offered in the community.

Some chapters of the American Society for Training and Development (ASTD) sponsor training events in the community. ASTD is an organization for specialists in training, adult education, and human resource development.

Colleges and adult schools in many communities offer classes on volunteer program management. If there aren't classes or workshops specifically in this field, other business and communication classes can apply to your job as manager.

VOLUNTEER, The National Center for Citizen Involvement, offers leadership development conferences on local, regional, and national levels.

**SCHOOLS** City or county school districts may already offer workshops for managers of volunteer programs and for volunteers. Many large districts have a Director of Volunteer Services. The National School Volunteer Program (N.S.V.P.) sponsors an annual national conference

**CHURCHES/ SYNAGOGUES** Diocesan, district, or regional level staff may include management of volunteer programs as an inservice option, either as a separate workshop or included in leadership conferences.

The same basic management principles apply to most volunteer programs, so don't look just to the inservice programs offered by your particular institution. Some of the most invigorating workshops I've facilitated or attended had representatives from a diversity of organizations. It may be easier to avoid the distractions of internal problems when there is diversity.

### **Using a Consultant or Outside Resource**

This workbook guides you and your associates toward asking pertinent questions and answering the questions yourselves. It can help you with much of your management planning.

You may have a situation that you can't resolve yourselves. Look for help from a person who has background that can be useful to your particular problem and who has objectivity. A person from outside your organization is sometimes needed to facilitate problem solving.

What do you look for in a consultant or "outside" resource?

1. Someone who has information that applies to your problem.
2. A person experienced in working with people.
3. Effectiveness in combining information and experience – this is de-

termined, in part, by talking with others who have seen the consultant work

Where do you find someone who can be helpful? Unless your program is quite unique, money is an issue. Too few volunteer programs have funds allocated for program development or for a paid consultant. Look for community agencies that offer consultant service at minimal or no cost. The Volunteer Bureau or Voluntary Action Center would be one place to inquire. Freelance consultants in program development, management, and communications are available in many communities. If a consultant you feel can meet your needs doesn't have background in the volunteer sector, reviewing this workbook can serve as an orientation for him or her.

Don't forget to utilize ideas from the people who are effective in a management function because it is common sense for them. I have a friend who is an innovative, successful fund raiser. She has no degree in finance or paid experience in the business world. Her ideas and approaches work . . . and I seek her advice. In my definition, she's an effective 'consultant,' and I call upon her. Do ask the effective people who can and probably will share what's worked for them.

### **Starting A Resource Library**

This handbook provides a very basic introduction to volunteer program management. For those wanting more in depth information, I recommend these three books for an initial resource library.

*Effective Management of Volunteer Programs*, by Marlene Wilson

Management theories about leadership, motivation, organizational climate, planning and evaluation, de-

legation – all applied to the tasks that confront the volunteer director. 1976. Order from: "Volunteer Readership"

*Taking Your Meetings Out of the Doldrums*, Eva Schindler-Rainman and Ronald Lippitt Provides practical ideas on how to develop more stimulating, enjoyable, and productive meetings. 1975. Learning Resources Corporation  
*Training Volunteer Leaders*.

A handbook to train volunteer and other leaders of Program Groups by National Council of Y.M.C.A.'s. This concise, easy-to-follow manual provides a comprehensive training program for leaders of small groups. 1974. Order from: "Volunteer Readership."

These books and catalogues of materials that apply to volunteer management can be obtained from:

Volunteer Readership  
P.O. Box 1807  
Boulder, Colorado 80306

University Associates and Learning Resources Corporation  
8517 Production Avenue  
San Diego, California 92121

*Voluntary Action Leadership*, a quarterly magazine, provides technical assistance to administrators of volunteer program and non-profit organizations. Every issue contains volunteer related news, issues, opinions as well as "how-to" features on all aspects of volunteer program management. Sample copy available from VOLUNTEER, P.O. Box 4179, Boulder, CO 80306.

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## **In Conclusion**

Volunteering or helping other people volunteer demands energy. My personal energy sources include caring, desire to make a difference, and belief in the purposes of organizations where I choose to become involved. These same energy sources are shared by most of us who are involved with voluntarism.

We possibly share something else. Blocks that exist in our complex world can obstruct goals and dampen enthusiasm and energy. It is my hope that using this workbook enables you to build upon the skills you already possess, weaken blocks, and conserve your energy.

Finally, I invite you, the managers of volunteer programs, to share your evaluation of *Helping People Volunteer* with me. What sections have been most useful? What ideas can you add? What didn't work for you? This workbook describes a process and is also 'in process.' Your input for its ongoing development will be appreciated.

## **About The Author**

Judy Rauner is a seasoned volunteer program consultant who has worked in schools, churches, agencies, and organizations. Her diversified "grass roots" experience makes her uniquely qualified to present her volunteer management process in this functional, informative workbook. She is a member of the American Society for Training and Development and an Associate of Volunteer: the National Center for Citizen Involvement. She is an author and sought after speaker and conference presenter. Judy holds an M.A. in Human Resources Management from Pepperdine University and several teaching credentials.



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**Marlene Wilson**

Volunteer Management Associates  
Author, **The Effective Management  
of Volunteer Programs**

"**Helping People Volunteer** presents some practical and helpful "how to's" for volunteer programs. The worksheets are uniquely designed to help you determine where your program is and where you want it to be and then suggests concise and sensible steps to get you there. It strikes me as a useful tool for those leaders of volunteers who seriously want to enable others to help more effectively."

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**Sarah A. Davis, Director**

Volunteer, Tutorial, and  
DOVES Programs  
Los Angeles Unified School District  
Advisory Council Member and Former  
President, National School Volunteer  
Program (N.S.V.P.)

"A superb and unique presentation! A practical and realistic process for managing effective volunteer programs. A wealth of practical approaches that can be applied and/or adapted to both District and local school volunteer programs. A great help for leaders in building successful school volunteer programs."

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**Dr. Thomas Downs**

Director, Florida Council of Churches  
Author, **Journey to Self, The Parish  
as a Learning Community**

"I have had the opportunity over the years to work with many leaders and groups in the training and development of any organization's greatest resource, volunteers. I know of no resource which so simply and effectively brings together a lucid description of volunteer leadership and dynamics. Judy Rauner is a professional whose obvious expertise and experience are evident in these pages. I cannot recommend more highly any such resource for its usefulness and practicalness in the planning, recruitment, training, and supervision of volunteers."