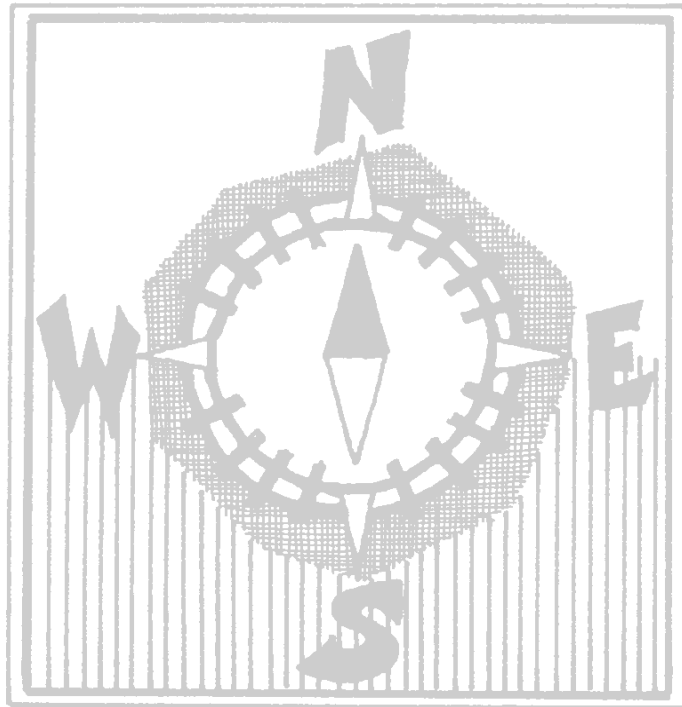


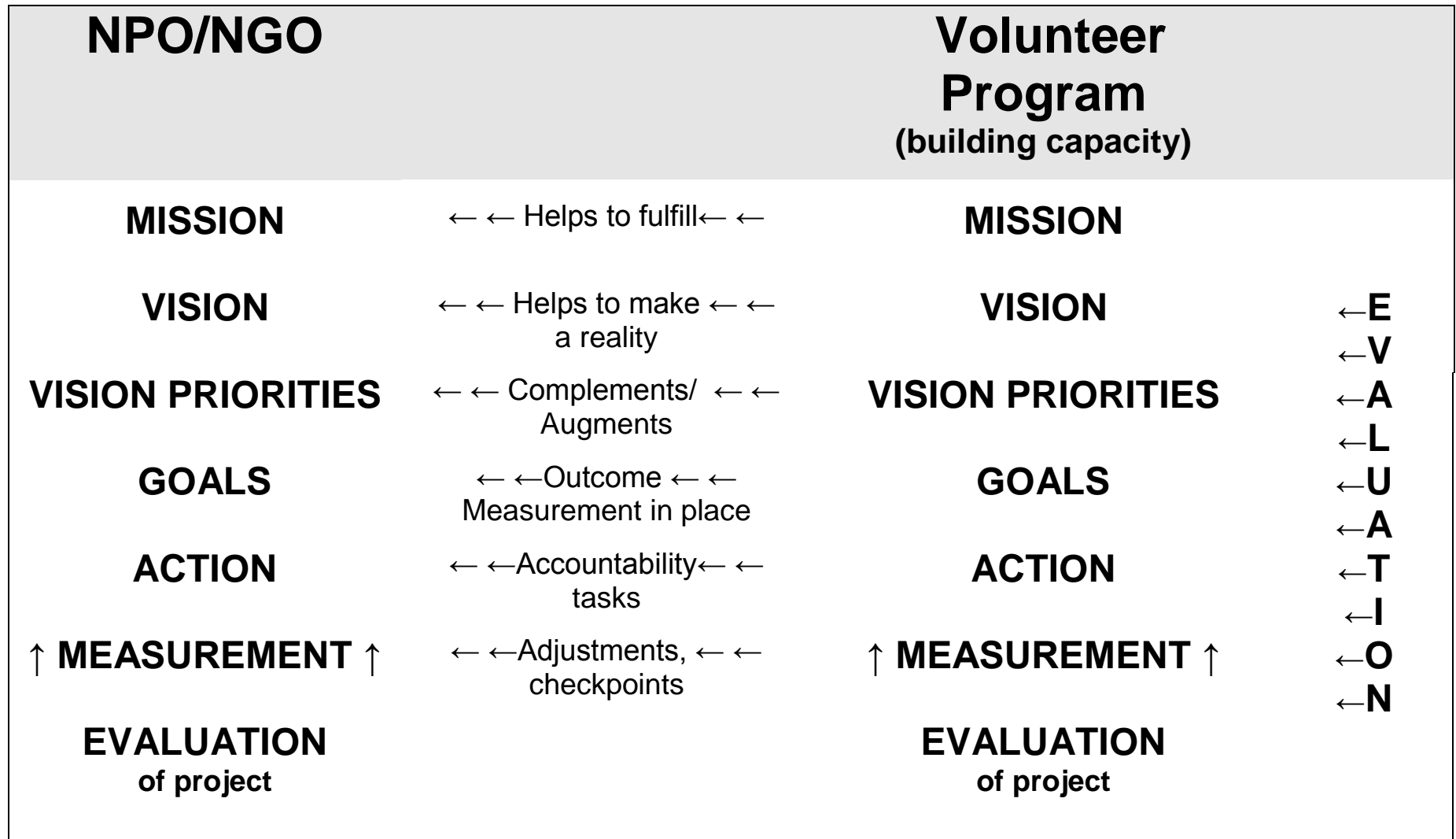
# **Nonprofit Management Center Strategic Volunteer Engagement**



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# STRATEGIC CONSIDERATIONS

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## Mission Statement

**A statement declaring why the volunteer program exists and helps to fulfill the mission of the nonprofit.**

- What is the mission of your volunteer program?
- Why does the volunteer program exist?
- How does it augment the mission of the NPO/NGO?

## Vision Statement

**A statement describing a desirable future state that does not yet exist.**

- What will your volunteer program look like in the future?
- What will it accomplish?
- Does the leadership clearly articulate and broadly share this vision?
- How does your volunteer program assist in reaching the vision of the nonprofit?

## Vision Priorities

**A list describing the differences between where the volunteer program is today and where it wants to be.**

- What priorities does your volunteer program have to sustain itself?
- How do the priorities for the volunteer program help to sustain the nonprofit?
- What are the gaps in service that the volunteer program can help close?
- Is there a program where if volunteers were used more clients could be served?

**WE HAVE:**

## Goals

**A list of statements describing the bigger steps necessary to address the vision priorities. They are usually written in sentence form.**

## Actions

**Plans or activities written to be accomplished to meet the goal. They are specific, measurable, achievable, relevant, and timely.**

- Do these steps indicate they will help to reach the vision priorities?
- How do these align with the goals and action of the nonprofit?

© Adapted From Organizational Planning

## EXERCISE: STRATEGIC CONSIDERATIONS

	Your NPO/NGO	The Volunteer Program
<b>MISSION</b>		
<b>VISION</b>		
<b>VISION PRIORITY</b>  <i>WE HAVE.....</i>		

## EXERCISE: WHERE DO YOU NEED VOLUNTEERS?

<b>ASSESSMENT QUESTIONS</b>	<b>WHAT COULD VOLUNTEERS SPECIFICALLY DO?</b>
What are some current GAPS in service that volunteers could fulfill?	
What are some areas that you need help with that a volunteer could be used to assist you?	
What are some areas, that are working well, that need some assistance in continuing to serve clients to a high degree?	
What are some areas we would like to expand our services to and could use the capacity building of volunteers?	
What are some areas that we have been dreaming about in the long-term that volunteers could help us with in the future?	

## THINGS TO CONSIDER

### TIMING

- **One-time** - One day only volunteering; “days of service,” fund raisers, special events
- **Occasional** - Now and then volunteering; special events team, on-call volunteers, substitutes
- **Short-term** - Fairly intensive volunteering for a short duration; seasonal volunteers, special event committees, short-term projects
- **On-going** – Daily, weekly or monthly volunteering on an ongoing basis: e.g. mentoring, tutoring, meals-on-wheels, etc.
- **Intensive** - Daily or 15+ hours a week volunteering with some kind of financial support; stipend positions, below-market wage positions, part-time paid positions

### TYPE

- **Direct Client** - Face-to-face service to clients or community members; tutoring, mentoring, friendly visiting, caring for animals, delivering meals, teaching
- **Indirect Client** - Service that benefits clients or community members without face-to-face contact; packing food, sorting clothing, cleaning up an abandoned lot, building houses
- **Advocacy** - Service directed toward social or governmental change; lobbying legislators, speaking to groups to raise awareness, writing articles, writing letters
- **Admin Support** - Service that helps organizations function; receptionist, office volunteer, information desk clerk
- **Technical** - Service that requires special technical skills; web design, computer programming, carpentry, plumbing, etc.
- **Managerial** - Service that involves supervising others or managing projects; volunteer coordinator, project leader, committee chair
- **Professional** - Service that requires extensive training and experience, certification or licensure; pro-bono accountant, human resources consultant, researcher
- **Governance** - Service involving organizational governance; board member, advisory council member

Adapted by Wendy Biro-Pollard from Developing Compelling Opportunities for Baby Boomers, Temple University Center for Intergenerational Learning, Training Network

## EXERCISE: WHAT, HOW MANY, AND HOW LONG?

Volunteer Task and Type \_\_\_\_\_

<b>What are some actions/ activities the volunteer(s) could complete?</b>	<b>How many volunteers will be needed and for how long? Episodic, one time, long term, intensive?</b>	<b>When will they be needed? Time of year, time of day, week?</b>

<b>What <u>skills/abilities</u> will be needed to complete this activity? BE SPECIFIC</b>	<b>What is the ultimate outcome when this is completed? How will it lead to the completion of the mission?</b>

# TASKS – ACTIVITIES CLARIFICATION

POSITION: \_\_\_\_\_

TASK TO BE PERFORMED	VOLUNTEER MUST KNOW ABOUT	VOLUNTEER MUST BE ABLE TO __ (skills)	TIME COMMITMENT

Resource commitment includes:

## TASK DESCRIPTION EXAMPLE

### Volunteer Task Description – Community Connector

**RESPONSIBLE TO:** Director of the Food Bank

**PURPOSE:** To broaden the number of organizations contacted to donate

**DESIRED OUTCOME:** Connect with various facets of the community.

**OVERALL OUTCOME:** To increase the amount of food brought into the food bank.

**RESPONSIBLE FOR:**

1. Contacting **three** of the following faith based organizations, corporations, local businesses, friends, family or relatives **each month** for the next **12 months**
2. Present the contact with the “Panty House Food Bank Story” **information**
3. Request the potential donor give a minimum of \_\_\_\_ food **each quarter** over the next **12 months**
4. Send in the **list of contacts** no later than the **5<sup>th</sup> of the month** after the contact is made to \_

**NEEDED SKILLS:**

- Customer Service, Outgoing Speak One-on-One with people
- Speak at events Explain the marketing materials
- Explain the food bank’s mission and goals

**QUALIFICATIONS:**

1. High school diploma or GED
2. Some computer knowledge helpful

**ORIENTATION AND TRAINING:**

- Attend special orientation to agency Special training on marketing
- Review of data base entry methods

**TIME COMMITMENT:**

A minimum of six hours per month for 12 months

**BENEFITS:**

The opportunity to meet new people and to assist those in need.



## **EXERCISE: TASK DESCRIPTIONS**

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**POSITION TITLE:**

**RESPONSIBLE TO:**

**PURPOSE:**

**DESIRED OUTCOME:**

**OVERALL OUTCOME:**

**RESPONSIBLE FOR AND DESIRED OUTCOMES:**

1.

2.

3.

4.

**SKILLS:**

**QUALIFICATIONS:**

**ORIENTATION AND TRAINING:**

**TIME COMMITMENT:**

**BENEFITS:**

## PERFORMANCE

Ideally, the volunteer and individual who will be supervising the volunteer will sit down and discuss what constitutes an acceptable performance. This discussion should be held before the volunteer begins any task. You can obtain performance objectives directly from the task description.

1. Contacting **three** of the following faith based organizations or corporations or friends, family, relatives **each month** for the next **12 months**.

**Performance standard** = The volunteer will contact **three** faith based groups or corporations or friends or family or relatives **each month** for the next **12 months**

2. Present the contact with the “Pantry House Food Bank Story” information

**Performance standard** = All groups contacted will receive a “Pantry House Food Bank Story”.

3. Request the potential donor **give** \_\_\_ **food each quarter** over the next 12 months

**Performance standard** = Each group contacted will give a minimum of \_\_\_ **food each quarter**.

4. Data about who was contacted.

**Performance standard** = Volunteers have the **data in by the 5th**. Data includes name, address, email, phone, point of contact name and the pledged gift entered in the database.

## EXERCISE: PERFORMANCE

RESPONSIBLE FOR:	PERFORMANCE OBJECTIVE
1.	
2.	

## BEFORE YOU RECRUIT HAVE YOU?

COMPLETED THE FOLLOWING	YES	NO
Has a needs assessment been performed?		
Is there a current vision and mission statement pertaining to the volunteer program?		
Have priorities, goals, and actions been established for the volunteer placement?		
Are there policies and procedures in place?		
Are there written task descriptions?		
Are there written performance standards?		
Is the staff trained to work with volunteers?		
Is there a volunteer handbook containing policies, procedures, history, staff names and positions, tasks descriptions, performance standards, etc?		
Have the roles of paid and volunteer staff members been clarified?		
Is there a budget to support the use of volunteers?		
Has a recruitment strategy been developed for potential volunteers? Is there a plan?		
Have you completed a marketing analysis of the best way to recruit?		
Is there a recognition plan in place?		
Is there a training plan in place for volunteers including an orientation?		
Do you know when, where, and how volunteers will fulfill their responsibilities?		
Have clear lines of communication between paid staff, volunteer staff, the volunteer program manager, etc. been developed?		
Have the mechanisms for solving volunteer disputes been developed?		
Is there a clear allocation of space, parking, technological assistance, etc. for the volunteers?		
Has a method of where to keep volunteer's applications, time records, evaluations, recognition's received and other data to be securely stored been determined?		
Is there a volunteer evaluation system in place?		
Is there a system in place about how the evaluations will be conducted?		
Have you determined the expected outcome of the volunteer's service?		
Have you determined what your agency offers volunteers?		
Have you developed an interview plan?		

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## “FIVE” P’S OF MARKETING

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- **Place**
  - The volunteer needs to know where they will be volunteering. The address needs to be clear and locatable on a GPS or Smartphone.
  - If the opportunity is virtual, specific guidelines need to be in place including computer security and confidentiality.
  - Are there choices where someone can volunteer to make it convenient?
  - If the volunteer’s task is off site, are there safety issues and how will those be addressed?
  - For recruitment, where are opportunities for volunteers found on your website and other social media outlets?
  - Where will you recruit?
- **Price**
  - First, what are the benefits of volunteering for your organization? Is it a social opportunity, a resume building opportunity, change/advocacy opportunity, making a difference opportunity, etc.
  - Will the cost to the volunteer in time and money present a good return on their investment (ROI) of these resources?
  - Consider how the NPO/NGO can make it as easy as possible to become a volunteer while adhering to good standards of interviewing, screening, and placing.
- **Promotion**
  - Once the specific tasks are identified for the volunteer to complete, where, when, and how are you going to advertise for the position.
  - Is the volunteer opportunity seasonal, a one-time opportunity, an on-going opportunity, etc.
  - What makes this opportunity more inviting than the thousands of other volunteer opportunities in your area?
  - Is what you are marketing different or like everyone else’s?
  - Can a volunteer potentially connect with other like-minded people?
  - Can potential volunteers check out what is available 24/7?
- **Product**
  - Is it clear what type of service the volunteer will fulfill when they volunteer for you and the end-result/outcome of that service?
  - Are there a variety of choices about how a volunteer can serve?
  - Is everyone on staff clear about what outcomes they expect the volunteer to produce when they volunteer?
- **Person**
  - Be specific about whom you are looking for in terms of skills, abilities, knowledge, and time commitment.
  - Understand what the volunteer wants to contribute versus what the NPO/NGO needs.
  - Is it possible to have volunteers who can create and customize what they would like to give to the NPO/NGO so they can become more engaged?

## EXERCISE: MARKETING QUESTIONS

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1. What business are you in?
2. What can volunteers do in your NPO?
3. What can your organization do for a volunteer?
4. What sets your volunteer program apart?
5. Why would people volunteer with you?
6. What do you offer that can attract and keep volunteers?
7. What do you tell people about your organization's uniqueness?

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# PLANNING QUESTIONS

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## Nuts and Bolts

What is your budget for marketing – financial and in-kind?

- Printing
- Website
- Messaging

What are the available opportunities?

- Components of a well-run volunteer program in place
- Skills identified

Whom should you target for each opportunity?

- Where can individuals with the skills needed for the opportunity be found?
- What are the hours and days of the week?

Where would you place or post this opportunity?

- Social media (Facebook, Twitter, LinkedIn, Foursquare, etc.)
- Websites (VolunteerMatch, etc.)
- Current and Former Volunteers
- Printed Media
- Displays
- Internal communications

What is the message for each opportunity?

- Tailored – generational, volunteer tasks/activities
- Clear
- Market ready

Which is the best method?

- Do you use one method or a mix?
- For social media and web based, how often is or can the message repeated?
- Which method will get you the biggest bang for your buck and time?
- What are the advantages and disadvantages for each method against each opportunity?

## MORE PLANNING

<b>TIME OF YEAR</b>	<b>Individual One Shot Short Duration</b>	<b>Individual Recurring</b>	<b>Group: One Shot Duration</b>	<b>Group: Recurring</b>
<b>FALL</b>				
<b>WINTER</b>				
<b>SPRING</b>				
<b>SUMMER</b>				

<b>Short Term Activities</b>	<b>One Time Activity – Short Time Frame</b>	<b>Short Time Frame Activities - Regular Basis</b>
<b>Ones You Currently Have</b>		
<b>Some You Could Develop</b>		
<b>Some a Group Could Do and Divide Up the Activities</b>		

## THE RECRUITMENT MESSAGE

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- The statement of need: list the needs of the clients rather than the organization.
- How the volunteer can help solve this problem: state the nature of the work that volunteers can do to help resolve the problem, whether hungry clients, battered children, lack of cultural arts in the schools, etc.
- The potential benefits to the volunteer: What benefits are inherent in this job.

The Electronic Journal of the Volunteer Community, Training Designs,  
Betty Stallings, Fall 2001 Issue; Marketing Magic, Marlene Wilson

## YOUR RECRUITMENT MESSAGE

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**CONSIDER: Skills, Timeframe, Type of Opportunity (direct, indirect, administrative, Pro Bono), Targeted Group, Individual, Where, Recruitment Technique**

**COMPLETE: “Regular”, One for a Website, Tweet**



# QUALITY ASSURANCE STANDARDS FOR VOLUNTEER PROGRAMS IN TEXAS

Organizations must be prepared to work with their volunteers in a manner that results in a mutually beneficial relationship—one in which the organization knows that something productive and necessary is being accomplished by volunteers and the individual volunteers believe that their talents and strengths are being utilized and appreciated.

As part of the Unified State Plan, a task force of experts in the field of volunteer management developed the following quality assurance standards. Their purpose is to promote excellence and accountability for every organization in the State of Texas that utilizes volunteers to help accomplish their mission. This includes small, rural grassroots organizations up to organizations with thousands of active volunteers.

The 6 major areas covered by the standards document include:

- |                                |                                |
|--------------------------------|--------------------------------|
| 1. Leadership                  | 4. Resources                   |
| 2. Planning and Infrastructure | 5. Volunteer Engagement        |
| 3. Measurement and Evaluation  | 6. Recognition and Celebration |

It is the desire of the task force that you will find this document useful in your work with volunteers. The task force consisted of individuals from the One Star Foundation (TxCVCS), Texas Center for Service-Learning, the Corporation for National and Community Service, Non Profit Management Centers, Volunteers Centers and the Network of Directors of Volunteers in Texas as well as a statewide teleconference group and a focus group at the 2003 Governor's Volunteer Leadership Conference.

## Standard #1 Leadership

- The organization and its leadership articulate and broadly share a vision for volunteerism. This vision is apparent in selected documents, such as an organization's mission statement, its strategic plan, and its annual report.
- The organization designates a qualified staff person to manage the volunteer program. This responsibility is reflected in the person's job description and constitutes a significant, dedicated time commitment to the management and well being of volunteers within the organization. The manager of volunteers reports to senior management and participates in appropriate organizational planning activities.
- The organization conceptualizes volunteer involvement broadly and is responsive to changing trends in volunteerism.

## Standard #2 Resources

- The organization budgets sufficient financial, technological, and human resources to facilitate volunteer involvement.
- The organization plans for, and budgets to support, a qualified manager of volunteers and his or her ongoing professional development.
- Appropriate physical space and resources are allocated for volunteers as well as for the manager of volunteers.
- All staff are aware of their responsibility to interact positively with volunteers and are trained to engage volunteers in the work of the organization.

**Standard #3 Planning and Infrastructure**

- The organization's strategic plan incorporates the work and contribution of direct, indirect, policy, and when appropriate, advocacy volunteers.
- Policy and procedure documents for volunteers are written and kept current. These documents address risk management, liability issues, and other volunteer personnel concerns and are consistent with policies and procedures for staff.
- Systems are in place for record keeping and data collection.
- Electronic and print communication systems facilitate staff and volunteer interaction. Volunteer opportunities, including on-line volunteering, are easily accessible to potential volunteers (through websites, newsletters, etc) and are kept current.

**Standard #4 Volunteer Engagement**

- An ongoing, targeted recruitment plan is designed to create a diverse community of volunteers.
- Each volunteer has a comprehensive position description that outlines performance expectations and a designated supervisor who gives regular feedback relative to his or her performance.
- Volunteers are interviewed, screened, and placed in positions that meet the needs of the organization and complement the skills and abilities of the volunteer.
- Volunteers are subject to background and reference checks commensurate with the risk associated with the position sought.
- Volunteers are oriented to the organization and its work and trained for the duties they are asked to perform.

**Standard #5: Measurement and Evaluation**

- Measurable goals and objectives, coupled with systems to monitor progress, provide for the ongoing evaluation of the volunteer and the program.
- Surveys and interviews, including exit interviews, monitor the experience of volunteers and provide a basis for program evaluation and improvement.
- The monetary value of the volunteer contribution is monitored and reported in agency reports. It is recommended that programs establish a consistent point of reference such as the ascribed value designated by the Independent Sector.

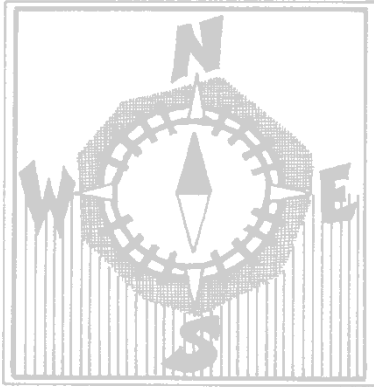
**Standard #6: Recognition and Celebration**

- Volunteers are formally thanked for the work they perform towards achieving the mission of the organization.
- Volunteers are recognized on an ongoing basis for their assistance and dedication.
- Staff are acknowledged for their contribution to the volunteer program.

**DEVELOPMENT INFORMATION:** The task force consisted of individuals from the One Star Foundation (TxCVCS), Texas Center for Service-Learning, the Corporation for National and Community Service, Non Profit Management Centers, Volunteers Centers and the Network of Directors of Volunteers in Texas as well as a statewide teleconference group and a focus group at the 2003 Governor's Volunteer Leadership Conference.

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