



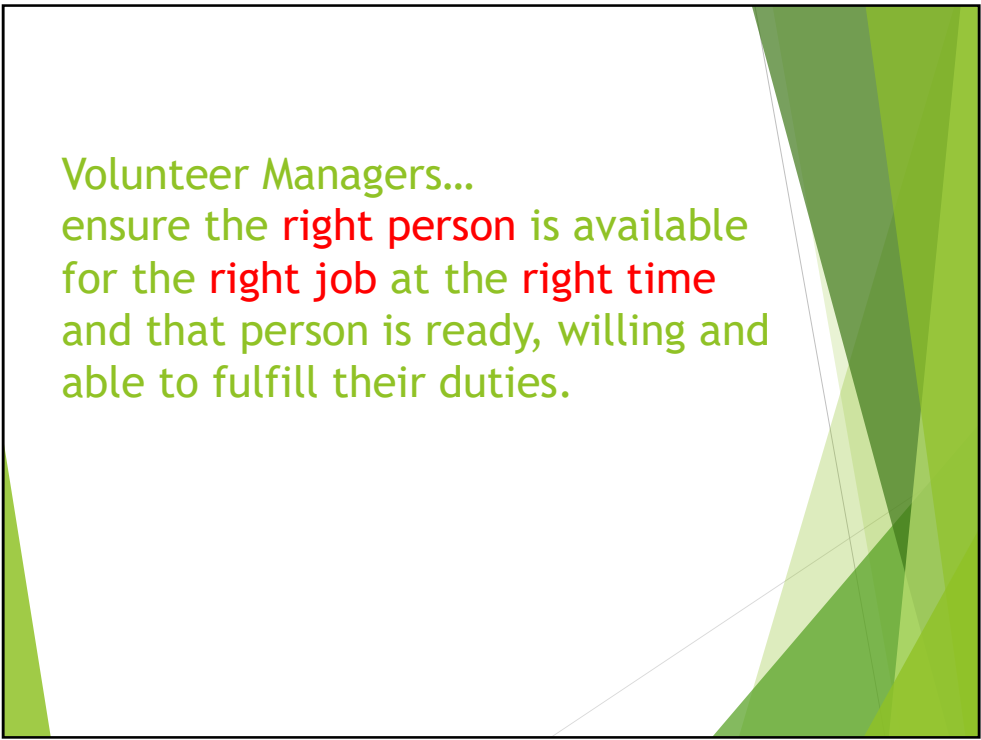
The Eight
Steps of
Volunteer
Engagement

Brought to you by:
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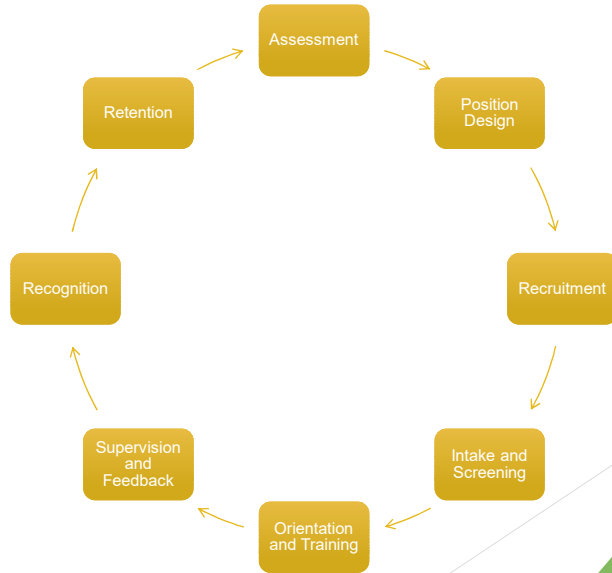
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Volunteer Managers...
ensure the **right person** is available
for the **right job** at the **right time**
and that person is ready, willing and
able to fulfill their duties.

The Eight Steps



The Legal Stuff

A Word About: Risk Management

- ▶ Risk management is about minimizing the potential for harm to your participants, your volunteers, your staff and your organization
- ▶ It is the essential, overarching component of all volunteer management
- ▶ No program will ever be risk free
- ▶ There are steps you can and MUST take to protect everyone.

You Minimize Risk When:

- You have a program which supports and is prepared for utilization of volunteers
- All volunteers are valued for their skills and contributions and are treated fairly - avoid favoritism - it will poison your program
- You ensure your volunteers have a sound understanding of the organization, it's structure and mission
- You ensure your volunteer's background, personal goals, skill sets, certifications and training match the job you have asked them to do
- Your volunteers understand the goals and objectives of the program and are well trained and equipped

You Minimize Risk When:

- ▶ You give volunteers constructive feedback about, and recognition for the work they do
- ▶ You give volunteers a reason to continue with your organization
- ▶ You maintain accurate records for each volunteer, including all administrative paperwork, communication, jobs assigned, hours worked, performance assessment, feedback and recognition given

1. Assessment

- ▶ Is the organization ready to utilize volunteers?
- ▶ Is the job appropriate for a volunteer?
- ▶ Are there volunteers available?

Tip: Stakeholder Survey

2. Position Design

- ▶ Title
- ▶ Date, time and location of event
- ▶ Supervisor's name and contact information
- ▶ Emergency contact information, especially if after hours
- ▶ Detailed description of responsibilities, as well as limits of authority
- ▶ Traits required for the job
- ▶ List of things to be provided by volunteer

Don't Forget: check with HR

Position Design II

- ▶ Statement of cost reimbursement
- ▶ Date, time and location of training
- ▶ Where and when to pick up and return money, supplies, equipment etc.
- ▶ Benefits to the volunteer
- ▶ This information is compiled into a Position description which is read and signed by the volunteer

3. Recruitment

Marketing!

- It is easier and more cost effective to retain and retrain the volunteers you have than to recruit new ones.
- Share your volunteer needs with your volunteers and AC members
- Consider which demographic might fulfill your volunteer needs based on your position description
- Where do you find that demographic?
- Write your ads for that demographic and post where they will be seen by that demographic
- Always present a problem, with the reader as the potential solution

4. Intake and Screening

- ▶ Prepare an intake document package. Include an organizational brochure if you have one, a letter of welcome outlining how volunteer's efforts impact the community, a volunteer application or profile for them to fill out and, along with your contact information, a request for them to return it to you.
- ▶ When someone drops by, or calls, make sure you have packages ready to hand out (or send out, or e-mail) and that others know where they are. Get the information out immediately.

Pre-package

Intake and Screening

Checks & Balances

- ▶ There are 22 different levels of screening for potential volunteers
- ▶ The level of screening depends on the level of risk posed by volunteer involvement in an activity
- ▶ All potential volunteers should be interviewed using a basic question list
- ▶ High risk volunteers may require reference checks, police security clearances and more
- ▶ Know your policy or create policy regarding outcomes of background checks

Intake Interview

Know thyself...

- ▶ Use a standard question format
- ▶ This is your opportunity to see how the potential volunteer presents themselves and to get a sense of whether they would be a good fit for the organization
- ▶ Let them do most of the talking, this is not an orientation session.
- ▶ Always keep in mind and remind them that volunteers can be accepted or declined and even terminated if the situation does not work out – have a written policy

5. Orientation and Training

Invest time early

- Orientation to the organizations structure, history, mission, vision, goals, objectives and policies is essential for every volunteer.
- Training is task specific and should be conducted by the task supervisor or a previously trained and trusted volunteer.

6. Supervision and Feedback

- The person responsible for supervising the volunteer should be identified on the position description
- Supervision must be appropriate to the experience of the volunteer and the level of trust between them and the supervisor
- Feedback, positive, constructive and instructive, must be given promptly and sometimes, with great patience and diplomacy!

Always 360

7. Recognition

- ▶ Both informal and formal
- ▶ Must be tailored to the volunteer
- ▶ Timeliness is critical

Ask them!

8. Retention

*Generously give
them your time!*

- ▶ Can a volunteer have a career with your organization?
- ▶ Can you present them with increasing levels of responsibility or new challenges?
- ▶ Do they understand how what they do benefits their community?
- ▶ Is the work meaningful to them?
- ▶ Do you listen and respond to their feedback?
- ▶ Do they always feel welcome, honored and valued?

Data, outcomes & impact!

A Word About: Record Keeping

- ▶ Utilize some form of comprehensive record keeping whether it is a binder, a database or specialized volunteer record storage service
- ▶ Gather and maintain complete information about each volunteer and their service
- ▶ Analyze your data – don't just store it...use it to build your case for more volunteers and more funding

Troubleshooting

Invest time early!

- ▶ Over-recruit – ALWAYS have a back-up volunteer, or plan B. Hint – it shouldn't always be staff!
- ▶ Written Recruitment and Marketing plan
- ▶ Volunteer Code of Conduct
- ▶ Rights and Responsibilities
- ▶ Volunteer Agreements
- ▶ Policy: Engaging and Terminating Volunteers
- ▶ Succession planning

For Resources in English &
Spanish
Connect with me @
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- ▶ <https://www.501commons.org/resources/tools-and-best-practices/volunteer-management>
- ▶ <http://www.idealists.org/info/VolunteerMgmt/Best>
- ▶ <http://blogs.volunteermatch.org/engagingvolunteers/2011/12/07/finding-the-right-volunteer-management-software/>
- ▶ <https://www.nonprofitready.org/course-category/volunteer-engagement>