13598

Successful Strategies for Recruiting, Training, and Utilizing Volunteers

A Guide for Faith- and Community-Based Service Providers

Substance Abuse and Mental Health Services Administration
Faith-Based and Community Initiative

EMPOWERING AMERICA'S GRASSROOTS

HHS-SAMHSA
Faith-Based and Community Initiative

U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES
Substance Abuse and Mental Health Services Administration
Center for Substance Abuse Treatment
www.samhsa.gov

Successful Strategies for Recruiting, Training, and Utilizing Volunteers

A Guide for Faith- and Community-Based Service Providers

Substance Abuse and Mental Health Services Administration
Faith-Based and Community Initiative

EMPOWERING AMERICA'S GRASSROOTS

HHS-SAMHSA
Faith-Based and Community Initiative

PROPERTY OF
Family and Youth
Services Bureau

U.S. Department of Health and Human Services
Substance Abuse and Mental Health Services Administration
Center for Substance Abuse Treatment

ACKNOWLEDGMENTS

This publication was developed for the Center for Substance Abuse Treatment (CSAT), Substance Abuse and Mental Health Services Administration (SAMHSA), U.S. Department of Health and Human Services (DHHS), by Northrop Grumman Health Solutions under Contract Number 277-00-6500, Task Order 8. Jocelyn Whitfield, M.S., served as the Government Project Officer. The content for the document was developed by the following members of an expert panel: Gregory K. Alex, M.A., CDC, The Matt Talbot Center; Mike Ennis, Convoy of Hope; Charles R. Lorrain, D.Min., International Conference of Police Chaplains; Jeremiah McGhee, Jr., New Creations, Inc.; David P. Peterson, Center for Substance Abuse Treatment Advisory Volunteer; Diane Powers, Nativity House; David Styers, Points of Light Foundation & Volunteer Center National Network; Norman "Tom" Thompson, Pacific Hills Outpatient Services; and Michael Warder, Southern California Children's Scholarship Fund.

PUBLIC DOMAIN NOTICE

All material appearing in this report is in the public domain, unless otherwise noted, and may be reproduced or copied without permission from the Substance Abuse and Mental Health Services Administration. Citation of the source is appreciated. However, this publication may *not* be reproduced or distributed for a fee without the specific, written authorization of the Office of Communications, SAMHSA, DHHS.

DISCLAIMER

The content of this publication does not necessarily reflect the views or policies of CSAT, SAMHSA, or DHHS.

OBTAINING ADDITIONAL COPIES OF PUBLICATION

Copies may be obtained, free of charge, from the National Clearinghouse for Alcohol and Drug Information (NCADI). For additional copies, please write or call:

National Clearinghouse for ohol and Drug Information (NCADI)
P.O. Box 2345
Rockville, MD 20847-2345
(301) 468-2600 1-800-729-6686 TDD 1-800-487-4889

ELECTRONIC ACCESS TO PUBLICATION

A searchable online version of this publication can be accessed through the Internet World Wide Web at www.samhsa.gov.

ORIGINATING OFFICE

Office of the Director
Center for Substance Abuse Treatment
Substance Abuse and Mental Health Services Administration
1 Choke Cherry Road
Rockville, Maryland 20857

DHHS Publication No. (SMA) 05-4005
Printed 2005

Contents

Introduction ..... **v**
Roles of Volunteers v
Scope of This Handbook vii

Chapter 1: Planning **1-1**
Define Your Mission 1-1
Assess Your Organization 1-2
Develop Your Volunteer Program 1-4
Describe Volunteer Positions 1-5
Resources 1-6

Chapter 2: Recruiting **2-1**
Assess Your Image 2-1
Decide How To Recruit 2-2
Develop Your Message 2-3
Find Volunteers 2-4
Select Volunteers 2-7
Screen Volunteers 2-8
Resources 2-10

Chapter 3: Training **3-1**
Develop Your Orientation Program 3-1
Assign Orientation Leaders 3-1
Schedule Orientation 3-2
Develop Materials 3-2
Conduct the Orientation 3-2
Train Your Volunteers 3-3
Resources 3-3

Chapter 4: Managing **4-1**
Assign a Supervisor 4-1
Communicate with Volunteers Regularly 4-2
Evaluate Your Volunteers 4-2
Avoid Volunteer Burnout 4-3
Recognize Your Volunteers' Efforts 4-4
Resources 4-6

Chapter 5: Evaluating **5-1**
Get Started with Your Program Evaluation: Describe Your Program 5-1
Design the Evaluation 5-3
Collect Data 5-3
Analyze the Data 5-5
Report Results 5-6
Resources 5-6

Contents (continued)

Appendix A: Sample Forms and Worksheets

Organizational Self-Assessment Form A-1
Volunteer Position Description Worksheet A-2
Volunteer Application Form A-3
Background Check Permission Form A-4
Volunteer Agreement A-5

Appendix B: Other Resources

Glossary B-1
Sample Mission Statements B-2
Types of Background Checks and Sources of Information B-3
Statutes and Acts Related to Volunteering B-4
References B-5
Other Print Resources B-6
Other Web-Based Resources B-9

Introduction

In the quiet hours when we are alone and there is nobody to tell us what fine fellows we are, we come sometimes upon a moment in which we wonder, not how much money we are earning, nor how famous we have become, but what good we are doing.

A.A. Milne

We all want a healthy community, a peaceful place where people live and work together in harmony. We all have ideas about how to make that happen. The big question is, who will make that happen? Volunteers can.

Volunteers are necessary and extremely helpful for a healthy community. People from all walks of life donate their time and effort to various causes, day and night, every day of the year. In a human services setting, agency clients and program participants usually can't distinguish between volunteers and paid staff, unless nametags make those designations.

The more connected to a community people feel, the more likely they are to take responsibility for the community and feel pride and a sense of commitment. Mobilizing community resources and expanding capacity through volunteers also enhance an organization's general profile, which can attract more volunteers, program participants, and funds.

Other potential benefits of using volunteers include the following:

- An increased ability to serve clients and respond to the needs of the community (e.g., increased services, expanded hours of operation, shorter wait times)
- Greater staff diversity (e.g., age, race, social background, income, education)
- Increased skill set
- Expanded community support.

Roles of Volunteers

Many people think of volunteers as helpers stopping by in their spare time to answer phones, organize files, or visit people who are sick or homebound. However, many organizations in their early days rely heavily on volunteers to do the work that is performed later by paid staff. Volunteers fill a key role in running organizations, handling day-to-day tasks, and raising funds. Without them, some organizations might not exist. In fact, the boards and committees of local agencies and associations consist entirely of volunteers. Larger organizations, such as the Salvation Army and the American Red Cross, have survived for more than 100 years due in large part to a strong volunteer commitment.

Even as organizations grow and hire paid staff, they rely on volunteers to perform important, necessary work. Faith-based organizations often have volunteer youth group leaders, religious school teachers, and mentors. Members of congregations may donate time during the week to help maintain the facilities and organize programs. These volunteers are critical to the survival of organizations.

Volunteers have a wide array of talents. Many are experienced professionals. Medical doctors, engineers, and financial planners volunteer, and so do students. In 2000, volunteers in the United States worked the equivalent of more than 9.1 million full-time employee positions at a combined worth of approximately $239 billion (Independent Sector, 2004).

Changes in the economy, such as early retirement incentives and an increased emphasis on workplace volunteering, have led to more volunteering among professionals. The Independent Sector reports that U.S. college graduates are 50 to 60 percent more likely to volunteer than high school graduates (1999). This new professionalism in the volunteer corps is creating an increased demand for professionalism in volunteer programs. Thus, the volunteer corps now consists of young professionals, retired workers, and management personnel.

Treatment and recovery programs have used volunteers to assist with running 12-Step support groups, educational support groups for the children of clients in treatment, and cultural and recreational activities. Volunteers welcome individuals arriving for treatment and their families, orient them, and make them comfortable; help with events, medical records, media relations, fundraising, community outreach and awareness programs, and in-service training; and sometimes perform clinical internships in treatment programs. In residential treatment and transitional housing settings, volunteers serve as house managers, provide child care for children while their parents are in groups, take clients to appointments with doctors, and transport children to schools. Volunteers working in jail and prison programs provide education on addiction and recovery, individual and group counseling, vocational training, and life skills classes, as well as lead parenting, anger management, and relapse prevention groups. In some cases, volunteers provide services in the area of landscaping, ensuring that there is a beautiful place for recovery. One author states, "a trained, skilled, and committed volunteer has always been a piece of gold for cash-strapped nonprofit organizations, including treatment programs" (Wenger, 2000, pp. 6–7).

Volunteers in America

- In 2003, about 64 million people (more than a quarter of the U.S. population) did volunteer work.[1]
- The value of volunteer time, on average, is $17.19 an hour.[2]
- Volunteers donate an average of 52 hours of time a year.[1]
- More women volunteer than men.[1]
- People 35 to 44 years old are most likely to volunteer, followed by people age 45 to 54.[1]
- Volunteers are most likely to work with religious groups, education or youth services, or social or community service groups.[1]

Source: (1) Bureau of Labor Statistics, 2003; (2) Independent Sector, 2004.

For example, Samaritan Village, a nonprofit organization in New York operating seven drug-free residential facilities, has used the skills of volunteers to alleviate the devastating impact of substance abuse on individuals, families, and communities for more than a generation. Volunteers have brought fresh and spontaneous enthusiasm, a cheerful and willing spirit, and a sustained commitment to the Samaritan Village mission.

Another treatment program that relies heavily on volunteers is Project H.O.P.E., an HIV/AIDS and substance abuse prevention program targeting African American and Hispanic women at risk for drug addiction and sexually transmitted diseases, including HIV. Volunteers at this Washington, DC, program provide a wide range of invaluable services, including preparing prevention kits and incentives for scheduled events; producing a quarterly newsletter; serving as chaperones for youth retreats; assisting with program referrals; helping with child care, transportation, and mental health services; acting as domestic violence and anger management training facilitators; and serving as advisors to the Board of Directors and STEPS Volunteer Program.

Other treatment, prevention, and recovery organizations call upon musicians who have been touched by alcohol or drug addiction to entertain or speak at program completion events, alumni activities, and fundraisers. Through education, live performances, and action programs, musician volunteers communicate a strong message to young adults about the benefits—and the freedom and fun—of a substance-free life.

The tasks performed by volunteers vary widely, from stuffing envelopes, translating materials for non-English speakers, and preparing meals, to providing medical care, legal support, and evaluation expertise. They provide clinical services; mentor, tutor, and train clients and other volunteers; and help with organizational operations, such as technical support. In short, volunteers help build and strengthen our communities by responding to the needs that make each community unique.

Volunteer Profile: Eugene

Location: Seattle, Washington

Target Population: Individuals who are homeless, addicted, and mentally ill

Position/Responsibilities: Administrative personnel

Manager's Comments: Eugene was addicted to heroin. He came through our program a few times and finally "got it." Gene now volunteers 3 to 5 days a week, helping to answer phones and work informally, "counseling" clients about the journey from the streets. He is an elder in the community of recovery, with a respect only accorded one who survives, and chooses to thrive, grateful for each day he is given.

Scope of This Handbook

Successful Strategies for Recruiting, Training, and Utilizing Volunteers is a guidance handbook designed for community groups and faith-based organizations seeking to maximize the skills of their volunteers, expand their services to the community, and enhance their effectiveness. Although the handbook focuses on prevention, treatment, and recovery services for substance

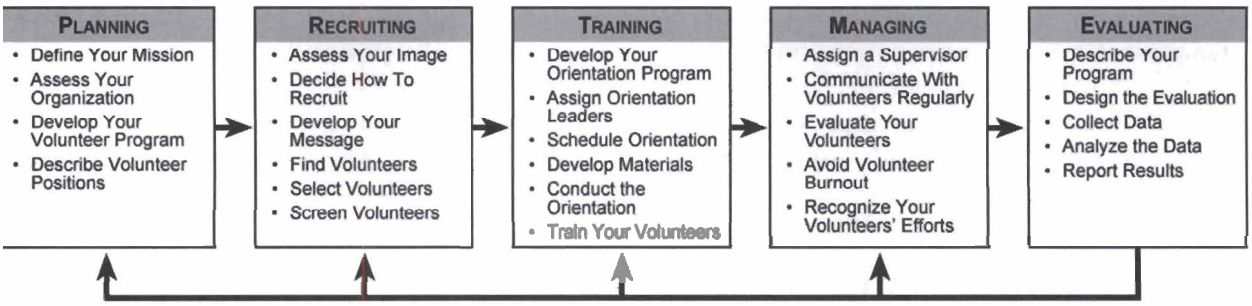
abuse and mental illness, the principles described in the handbook can be applied to any field and should help organizations understand how to implement and manage a successful volunteer program.

Representatives from successful community- and faith-based organizations and volunteer networks participated in the development of this handbook. They provided information that was invaluable in organizing the handbook and identified best practices that have been incorporated throughout the document.

The five chapters in this handbook delineate specific steps to take in implementing an effective volunteer program:

1. Planning
2. Recruiting
3. Training
4. Managing
5. Evaluating.

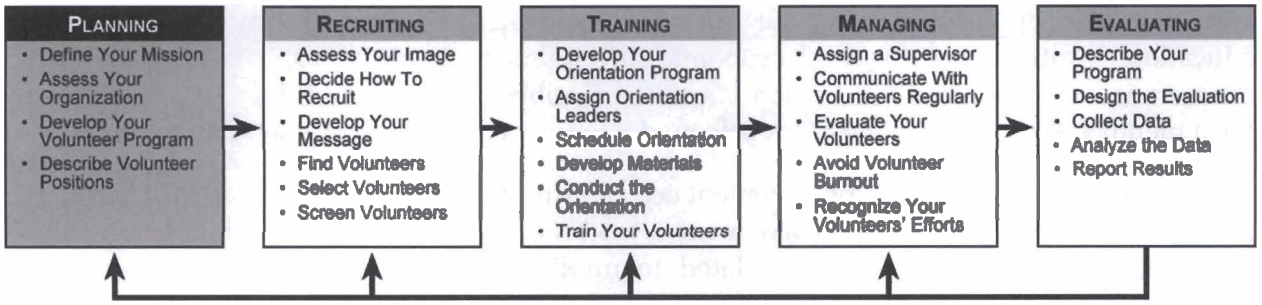
The figure below illustrates each of the steps in this process. At the beginning of each chapter, this diagram appears again with the relevant step in the process highlighted.



The appendixes at the end of this handbook include sample forms and worksheets, a glossary, and print and Web-based resources. In addition, volunteer profiles throughout the document showcase the talent, passion, and commitment of volunteers and provide a sampling of the diversity of volunteer positions.

The guidelines in this handbook are meant to get you started. You will need to customize them to meet the circumstances of your community and organization and to comply with your organization's bylaws and Federal, State, and local laws and regulations.

Chapter 1: Planning



Those who are not looking for happiness are the most likely to find it, because those who are searching forget that the surest way to be happy is to seek happiness for others.

Martin Luther King, Jr.

Every organization has a vision, such as a world of healthy children, a drug-free community, or a home for everyone. The organization's mission helps define how to reach the goal embodied in the vision. Volunteers can play an important role in helping to carry out this mission.

Volunteers of America

Volunteers of America (VOA) is a national, nonprofit, spiritually based organization providing local human service programs and opportunities for individual and community involvement. From rural America to inner-city neighborhoods, VOA provides outreach programs that deal with today's most pressing social needs. VOA's Substance Abuse Services provides intervention, education, and prevention services.

Planning for your volunteer program helps you ascertain how volunteers will contribute to your mission and fit into your organization's structure. You also can determine the purpose of your volunteer program and the roles volunteers will play. Part of this planning process includes seeking input from people who will be affected by the volunteer program, particularly the board, staff, and clients. This chapter discusses aspects of planning, including defining your mission, assessing your organization, developing a volunteer program, and describing volunteer positions.

Define Your Mission

A sound mission statement will help define how volunteers fit into your organization. Your mission statement identifies the scope of your organization's operations and reflects its values

and priorities. It helps you make consistent decisions, motivate others, build organizational unity, integrate objectives with goals, and enhance communication. It can help you market your organization by succinctly describing its culture and purpose.

What does a mission statement look like? Here's an example: The mission of 100 Black Men of America is to improve the quality of life within our communities and enhance educational and economic opportunities for all African Americans. Its activities include mentoring, education, health awareness, and economic development. The 100, as it is known, has 95 chapters in the United States, England, and the Caribbean, with more than 10,000 members. Each member serves as a strong Black role model for our youth in today's society.

Usually, creation of a mission statement occurs as part of organizational planning. Although the topic of developing a mission statement is too broad for the scope of this handbook, below we provide some basic principles related to mission statements. Resources for additional information can be found at the end of this chapter, and sample mission statements appear in Appendix B.

When you develop your mission statement,

- Involve members at all levels of the organization
- Put it in writing, and ensure that it is sufficient to help focus your organization's efforts
- Give it to all your members and post it prominently
- Make sure that everyone understands it.

Assess Your Organization

Reviewing your organization's use of volunteers will help you determine the direction you want to take. Defining how you use volunteers, how you'd like to use volunteers, and how you can develop a program will set the stage for a successful endeavor.

Assess Your Use of Volunteers

The first step in developing a volunteer program is for you, your staff, and your board to assess your organization's use of volunteers. You should agree on the reasons for using volunteers and how volunteers fit into the organization's structure. For example,

- How will staff react?
- Will you be able to expand your services if you use volunteers, or is a volunteer program a way to save money?
- How will using volunteers affect collaborative efforts? Will your partners be amenable to working with your volunteers? Can you and your partners share volunteers?

Thus, you'll want to examine how using volunteers might change your organization's work, as well as its culture. This discussion will give you a foundation on which to

- Define the work volunteers will do
- Explain to recruits your reasons for wanting volunteers
- Create healthy teamwork between paid and unpaid staff.

Laying the groundwork for a volunteer program will help you create positions that are meaningful and important. Completing an organizational self-assessment form (see Appendix A) may give you an idea of where you are in the process of developing a volunteer program. Questions may include whether you use volunteers, how you use volunteers, and how you recruit volunteers. You also may want to look at what might attract volunteers.

Determine What Volunteers Will Do

Once you define how your organization plans to use volunteers, the next step is to determine what your organization expects the volunteers to accomplish. Volunteers can enhance service delivery and programs, well beyond answering phones and providing other general clerical support. Also keep in mind that volunteers should fill unique roles. You do not want to duplicate efforts within your organization or with other organizations just to use volunteers.

Set specific goals and objectives for volunteer achievement, defining how volunteers will make a difference in service delivery. Review these goals and objectives regularly and modify them if necessary. Over time, you will be able to use data from volunteer achievements to show how the program has improved your community. The data will help you market your program and recruit new volunteers. Chapter 5 describes the steps in evaluation in more detail.

Determine the Types of Volunteers You Need

Volunteers can be divided into three types:

- General assistants, such as people who answer phones or help with mailings
- Skill-specific volunteers, such as Web designers
- Pro bono volunteers, such as physicians who provide services at no charge.

You will need to determine which type or types of volunteers would benefit your organization. Nativity House in Washington State uses different types of volunteers. One volunteer provides general assistance, such as event setup and cleanup. He also provides skill-specific assistance, acting as newspaper advisor. The organization also has a volunteer nurse who attends to the health needs of the clients.

Faith-based and community organizations can avail themselves of various types of volunteers to address substance abuse issues. Teachers can help with prevention education; social workers can provide counseling; business people can mentor youth; and congregation members can serve as youth group leaders, develop prevention materials, or lead afterschool programs.

Identify Resources for Supporting a Volunteer Program

Another important step in assessing your organization is determining whether it has the resources to support a volunteer program. You might need to hire a volunteer coordinator if volunteers are going to be a large part of your service delivery. You also will need to look at your staffing plan to identify people who have time to supervise volunteers. If necessary, update position descriptions to include supervising or otherwise working with volunteers.

Space is also an issue. Your volunteers will need a place to work without inconveniencing paid staff, although permanent office space is not necessary. Volunteers who work offsite can

Volunteer Profile: Natalya

Location: Omaha, Nebraska

Target Population: Ex-offenders, individuals affected by substance abuse, and homeless persons

Position/Responsibilities: Administrative Assistant

Volunteer's Comments: I am an ex-offender and substance abuser in recovery. I was released from prison in November 2002 and placed in the custody of the Williams Prepared Place, a faith-based treatment program in Omaha, Nebraska. During my stay, I became extremely bored, and I complained about it. The Administrative Assistant offered me some volunteer office work, which included typing documents, filing, and assisting her with everyday office responsibilities. She gave me something to do each day and trained me to perform many clerical tasks. Soon after this, the program offered me a part-time position doing administrative work. When the Administrative Assistant left the program, I was offered a full-time position. I now have a full-time position as an Administrative Assistant with the Williams Prepared Place.

communicate by phone and e-mail and visit your program for regular meetings to address any issues that arise. Some volunteers, such as stay-at-home mothers, might benefit from having offsite access to your computer network.

Volunteer programs are not free, even though you don't pay salaries. Time and other resources must be invested to ensure that volunteers are effective. Your organization will incur costs associated with marketing and volunteer recruitment; the volunteer application and screening process; and the orientation, training, management, evaluation, and recognition of volunteers. In spite of these costs, a volunteer program is a worthwhile investment for almost any organization that has determined the need for a program and is willing to make the commitment. The benefits far outweigh the investment.

Develop Your Volunteer Program

Volunteers, like paid staff, need to get help with problems and answers to their questions. They need to feel productive, do work that challenges them, and have an opportunity to grow. They also need to know they are valued for what they do.

To have highly effective volunteers, you will need the following:

- A designated volunteer coordinator. Coordinating volunteers should not be a shared responsibility that staff attend to when they have "spare time."
- A defined volunteer program, with the role of volunteers in your organization and position descriptions.
- A volunteer training program and supporting materials, such as a handbook.
- A clear set of rules for volunteers and for staff working with volunteers.
- A recruitment and management plan.
- A recognition program, such as an annual awards ceremony.

Clearly defining and organizing your volunteer program will help ensure that volunteers, staff, and clients have a productive and worthwhile experience with your organization.

A key component of your volunteer program is your board of directors. Board members should be involved in all aspects of your new or expanded volunteer program, beginning with the planning. After all, they are volunteers themselves.

The board must make a commitment to support and encourage volunteer involvement. Board members need to understand that a successful volunteer program improves the organization's image, helps to expand services, and leads to better fundraising. They can assist the volunteer program with such tasks as

- Distributing recruitment materials at their workplaces or other public places
- Mentioning volunteer opportunities at their public speaking engagements
- Speaking at specific recruitment events
- Taking part in the volunteer orientation and training
- Attending and helping with volunteer recognition events.

If your program is part of a large organization with a board that is extremely busy with other projects, make sure that the group does not overlook the volunteer program. If you do not have direct access to the board, get on the agenda for at least one meeting per year to provide an update on the volunteer program, answer questions, and request support. Provide data (e.g., more clients served, additional hours worked, new expertise gained) for the board on how the volunteer program is affecting the organization positively.

If possible, ask the board to create a volunteer program subcommittee, including a few board members, a few volunteers, and the volunteer manager. This subcommittee would assume responsibility for some delegated tasks and would communicate volunteer-related issues and information to the entire board.

Describe Volunteer Positions

After you decide how to use volunteers in your organization, you will need to write position descriptions for the volunteer positions you've identified. Position descriptions are key elements of a successful volunteer program. They help you screen, place, and evaluate volunteers in a fair and reasonable way. Well-written volunteer position descriptions can help volunteers screen themselves. Volunteers can tell whether they have the necessary time, skills, and interest to perform the position tasks outlined.

Almost any position can be converted into a volunteer position, given the right structure, incentives, and volunteer qualifications. Because volunteers play a different role than staff do, however, ensure that you define the positions clearly. For example, teaching as a volunteer can be quite different from teaching as a full-time staff member at a school.

Volunteers who understand your organization's expectations will do a better job and feel more satisfied with their duties than will volunteers who don't understand their role. The worksheet below breaks the volunteer position description down by its components and definitions. It can help you develop meaningful position descriptions with achievable goals. A blank copy of this worksheet is available in Appendix A.

Sample Volunteer Position Description Worksheet

Component	Definition	Example
Job Title	What the job or the position will be called.	Public Relations Chair.
Purpose	The specific purpose of the position (expected result). If possible, the purpose should be stated in relation to the program's mission and goals.	Develop and implement activities to increase awareness of the organization and its mission and programs.
Key Responsibilities	Major duties, including what might be done to accomplish the purpose.	Develop a public relations plan; manage the public relations committee; develop media contacts; and produce publicity kits, materials, and press releases.
Location	Volunteer's worksite.	Headquarters.
Supervision	Title of the person to whom the volunteer will report, as well as the procedures for mentoring and dealing with problems.	Executive Director; weekly meetings or calls.
Length of Appointment	The time period in which the volunteer will serve, including any time restrictions.	1 year.
Time Commitment	The approximate number of days or hours required per week and flexibility in scheduling.	4 hours/week plus time at events; may work more the week before events.
Qualifications	Education, work experience, knowledge, and skills required, as well as any requirement for a criminal history record check.	Writing and presentation skills, public relations experience, knowledge of organization and community, membership in organization.
Benefits	Training, insurance, parking, events to thank volunteers, or other benefits.	Free t-shirt, free parking, reimbursement of expenses, volunteer awards banquet.
Support Provided	Resources available to volunteers.	Volunteer handbook and orientation.

Source: Adapted from McCurley and Lynch, 1996. Copyright © 2004 by the Points of Light Foundation & Volunteer Center National Network. Used by permission only. This material cannot be reproduced for wide distribution or resale in any form or incorporated into any proprietary information retrieval system, electronic or mechanical, without the written permission of the Points of Light Foundation & Volunteer Center National Network.

Resources*

Abrahams, J. *The Mission Statement Book: 301 Corporate Mission Statements from America's Top Companies.* Berkeley, CA: Ten Speed Press, 1995.

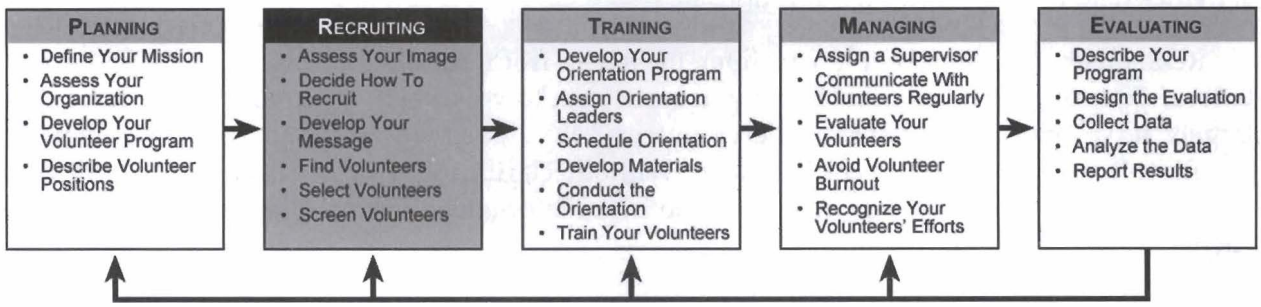
Business Planning Experts, www.bplans.com/dp/missionstatement.cfm.

Drucker, P.F. *Managing the Non-Profit Organization: Principles and Practices.* Reprint edition. New York: HarperBusiness, 1992 (pages 3–49).

The Grantsmanship Center, www.tgci.com/magazine/98fall/mission.asp.

* The views, opinions, and content of these resources are those of the citation and do not necessarily reflect the views, opinions, or policies of SAMHSA or DHHS.

Chapter 2: Recruiting



We won't always know whose lives we touched and made better for our having cared, because actions can sometimes have unforeseen ramifications. What's important is that you do care and you act.

Charlotte Lunsford

Developing a volunteer network can be crucial to an organization's success. Volunteers are often the heart and soul of an organization, providing services and performing tasks that keep the organization alive. Many organizations, such as Big Brothers/Big Sisters and the Salvation Army, have more volunteers than paid staff. Creating a cadre of highly effective volunteers requires a recruitment strategy.

Volunteer recruitment means attracting and inviting people to consider involvement with your organization. Your internal review will help you learn how the community and the public perceive your organization. You can use this information to develop a volunteer recruitment plan. This chapter discusses aspects of recruiting, including assessing your image; deciding how to recruit; developing your message; and finding, selecting, and screening volunteers.

Assess Your Image

People volunteer for organizations they perceive as worthwhile. They want to know that their contribution will make a difference. They also tend to volunteer for organizations that promote a particular cause or are active in particular areas, such as child welfare or substance abuse prevention.

People will volunteer at your organization for many reasons, but their perception of your organization will attract them initially. Do not assume that the public knows what your organization is and what it does. Think about recent publicity, existing marketing materials (do they include information on volunteer involvement?), and public perception of your client group and cause. It is important that people associate your organization with value to the community.

Don't assume that volunteers won't want to work with a "difficult" client base. Try to describe your clients so that prospective volunteers can decide if they will feel comfortable working with your population. You can address possible stereotypes by showing a video, slide show, or photographs. For example, nursing homes find that people assume that their residents are in bed all day. Slides that show volunteers interacting with residents engaged in various activities help to counter this assumption.

Remember, too, that people can infer messages from your organization's title and client base. If you run a women's center, do you want men to volunteer? Does your AIDS clinic that largely serves gay males want female volunteers? If you serve a Hispanic/Latino population, do all volunteers have to speak Spanish? Without clarification, prospective volunteers may assume wrongly that they are not welcome at your organization or qualified to serve your clients.

To counter incorrect assumptions, be prepared to respond to questions regarding your organization's successes and failures, its mission, and characteristics that distinguish your organization from others doing similar work. The more clearly you understand your organization's image, the better able you will be to stress the positives, correct misperceptions, and target the people who would feel comfortable affiliating with your organization.

One way to make your image more welcoming to volunteers is to make volunteers visible throughout the organization. Use a public bulletin board to promote news about volunteers. Decorate it with photographs and include a pocket for flyers on volunteer opportunities. If your organization is affiliated with a house of worship or other organization that has a regular bulletin or newsletter, ask the editor about running a regular column profiling volunteers and their work.

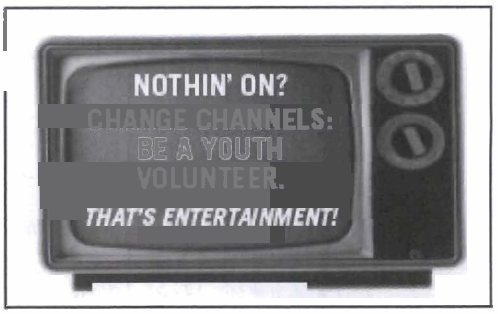
Decide How To Recruit

Usually, the first volunteers you recruit are for your organization's board of directors. They can be active members of your congregation, prominent community members, or professionals with an interest in your organization's mission. Active and influential board members can help recruit other volunteers. They are the public face of your organization and often your biggest donors. Thus, board members are in the best position to promote the organization's mission and values to potential volunteers.

In addition to relying on your board, you can use many other methods to recruit volunteers. The possibilities can be as diverse as your organization itself. Before choosing a method, consider the time each possible method will require to plan, develop, and execute, as well as the time it will require to deliver and maintain the number of volunteer positions you seek to fill.

Part of recruitment involves public education, building the public image of your organization or cause. Therefore, your recruitment campaign should have multiple purposes (e.g., recruit volunteers; raise funds; educate neighbors, community providers, and school groups).

Options for recruiting include the following:



Sample print ad, The Ontario Rural Council and the Valuing the Rural Volunteer Project, supported by the Ontario Trillium Foundation

- Contacting your local volunteer center
- Using current volunteers—they are convincing salespeople, because they are committed to your cause and believe in your organization
- Using the mass media (e.g., television, radio, newspapers, billboards), as well as neighborhood newspapers, newsletters, and organizational bulletins
- Making announcements at services, educational sessions, meetings, and social gatherings of your congregation or organization
- Posting volunteer opportunities on appropriate Web sites
- Making personal appearances at schools, senior centers, career fairs, and other venues or events
- Giving slide shows and videotape presentations
- Staffing booths and exhibits at special events
- Using mailings, from mass mailings to personalized, handwritten notes
- Getting referrals from staff, ministers, friends, and lay leaders, such as deacons
- Registering with volunteer referral organizations
- Volunteering in other organizations' projects
- Coordinating with schools that require community service hours for graduation
- Asking people to volunteer—most people volunteer because they are asked.

Printed materials also are vital to the marketing and recruitment process. Brochures and flyers can be used in mailings or as takeaways at presentations and special events. You also can use posters, bookmarks, and envelope stuffers to draw attention to your cause. Before spending time and money on printing, however, think through how you are going to use and distribute your printed material. To make any printed material multitask for you, don't forget to include information on where to send any monetary donations.

Develop Your Message

Your recruitment message should be inviting and encourage people to become involved with your organization. You may have multiple recruitment messages tailored to the different volunteers your organization requires, such as students, professionals, neighborhood residents, or the family members of clients. Each message should identify the specific needs of your clients or your organization, the ways in which a volunteer can address the needs, and the benefits to the volunteer.

Motivations for Volunteering

- Feel needed.
- Share skills.
- Have a change of pace.
- Help someone.
- Explore a career.
- Donate time.
- Do something outside of oneself.
- Learn a new skill.
- Give back to the community.
- Fulfill a spiritual need or obligation.
- Get to know the community better.
- Make new friends.
- Be an advocate.
- Fulfill a mandate or requirement.
- Set an example for children.
- Act on a passion.

In evaluating your recruitment message, ask yourself these questions:

- Does the message honor the volunteer?
- Is the message tailored to a target audience?
- Does my invitation describe the needs of our clients or organization?
- Who in the organization can best deliver this message?

Look beyond immediate needs. While you might be looking for volunteers to help with an event, you might find a computer programmer or financial advisor who is willing to share his or her valuable technical skills. By the same token, some people want a diversion from their careers. A physician might want to help teach as part of a health education program rather than provide medical care. Talk to people about their skills and interests so that you can attract them to your organization in the best way.

Find Volunteers

Your congregation or organization's members are the most obvious sources of volunteers, but don't limit recruitment to these options. Ask friends, neighbors, and community leaders if they would like to volunteer or suggest others who might be interested.

Constantly look for new recruits so that your organization does not rely too heavily on the same volunteers for every task. If your volunteers experience "burnout" and leave your organization, you may have a hard time replacing them with people who have adequate knowledge and experience. Finding new volunteers may seem daunting, but you can look in a variety of places.

Volunteer Service Organizations

Faith-specific and nondenominational volunteer service organizations (VSOs) provide volunteers to work full time for a prescribed period of time in positions within the community. These organizations screen their volunteers and are united by missions of service, including working for social justice and living simply. Some VSOs require a financial commitment for each volunteer, but generally the cost is less than the going rate for full-time positions.

Faith-specific VSOs include Avodah: The Jewish Service Corps, Brethren Volunteer Service, Episcopal Church Volunteers for Mission, Interns for Peace, Jesuit Volunteer Corps, Jewish Organizing Initiative, Lutheran Volunteer Corps, Mennonite Voluntary Service, United Methodist Volunteers in Mission, and Volunteers of America. Nondenominational volunteer service organizations include AmeriCorps and VISTA. Most of these organizations are listed in phone books and have Web sites.

Volunteer Profile: Mel

Location: Seattle, Washington

Target Population: Individuals who are homeless, addicted, and mentally ill

Position/Responsibilities: Clinical faculty

Manager's Comments: Mel was an original founding member of a national drug and alcohol counselors association. Each week for the past 9 years, Mel has been teaching classes, running groups, and providing personal counseling and support for countless men and women going through our treatment program. Mel is giving back, but with an authority and a consistency that few can give. He is also a retired World War II Air Force bomber pilot. He is able to relate to our veterans and understand the role that war can play in a person's addiction and struggle to recover. Mel and other professionals like him make it possible for our clients to receive first-class treatment, on demand, for free.

Volunteer Referral Services

Volunteer referral services can be of great help in directing potential volunteers to your program. These services help potential volunteers find positions that fit well with their skills, interests, and availability. Your organization should register with any clearinghouse, database, directory, or program offering volunteer referral services in your area. Volunteer referral services may be citywide, countywide, statewide, or nationwide. For example, the Points of Light Foundation & Volunteer Center National Network has a directory of local and regional volunteer centers. Senior Corps also acts as a referral service for community and faith-based organizations.

Students

Children and young people can make substantial contributions to a volunteer force. Community service benefits the students, the community, and the organizations in which students volunteer. Many high schools require community service for students to graduate. These students may develop a lifelong dedication to community support. In addition, when students become interested in a cause, they may motivate their parents to donate time and money.

College students can offer professional-level services, with a connection to university resources and, often, academic supervision. Additional resources include national honor societies and professional and social fraternities and sororities. Campus religious clubs, such as Campus Life, Fellowship of Christian Athletes, Hillel, Muslim student associations, and Newman Catholic Centers, are other potential resources for locating volunteers.

Businesses

Many members of the business community include community responsibility in their charters. They aid nonprofit organizations by contributing cash, equipment, services, and employee volunteers. They create supportive work environments to inspire employees and allow them to volunteer in the communities in which they work. To help encourage corporate participation, organizations should create quantifiable goals for volunteering (e.g., 1,000 hours of computer training) and work with their corporate partners to market their partnership and successes.

In a 1999 survey by the Points of Light Foundation and Allstate Foundation, 81 percent of companies connected volunteering to their overall business strategies (Amery, 2001). Respondents unanimously agreed that corporate volunteering helped create healthier communities and improved a company's public image. Nearly all (97 percent) agreed or strongly agreed that these programs improved employee teamwork.

Other Sources for Volunteers

You can find volunteers almost anywhere, but some additional sources include

- People in recovery
- Retirees
- Community associations
- People from shelters
- State denominational offices
- Persons mandated to perform community service
- Stay-at-home mothers
- Service providers.

Volunteer Profile: Union Rescue Mission (URM) Volunteers

Location: Los Angeles, California

Position/Responsibilities: In 2003, volunteers worked 43,250 hours. Volunteers assisted URM in a wide range of areas, including food service, administration, youth ministries, educational training, and special projects.

Target Population: Ex-offenders, homeless persons, and individuals affected by substance abuse and mental illness

Manager's Comments: We are using Spanish-speaking ministers from the community to teach the 12 Steps to Hispanic program participants. Volunteer staff from Operation Hope supplement our staff by teaching about finances (e.g., budgeting, basic banking, credit repair, home ownership, entrepreneurial ventures). Cedars Sinai Hospital staff offer parenting classes to men and women in the program. Retired teachers volunteer in the Bank of America Learning Center located at Union Rescue Mission. Program alumni and volunteers from the community mentor men and women who are ex-offenders. Other volunteers provide clerical support (e.g., performing office duties, editing revisions in program manuals and handbooks).

Select Volunteers

You can use volunteer applications to gather information for the interview and screening process. Volunteer applications may vary, depending on the level of detail you need, but minimally you'll want to gather information about the applicant's qualifications; work and volunteer experience; and skills, interests, and motivations for volunteering. This information can help you identify possible roles for the volunteer. Appendix A contains a sample volunteer application.

Desired Traits in a Volunteer

- A sense of humor
- Organization or leadership skills
- Interest in or a personal connection to the cause
- Positive attitude
- Flexibility
- A heartfelt desire to serve

Meeting with volunteers before bringing them onboard is essential. You may employ two basic types of volunteer interviews:

1. An interview to determine the prospective volunteer's skills, interests, and boundaries (i.e., activities in which the applicant would *not* like to be involved) in order to assign the individual to a particular role
2. An interview for a specific position to determine whether an applicant meets the requirements.

Sample Interview Questions

- What would you like to know about our organization?
- What attracted you to our organization?
- What types of work have you done before? What did you like best about that work?
- What kinds of experience or training have you had that would help you contribute here?
- How do you deal with situations that don't go as planned?
- Would you rather work on your own, with a group, or with a partner? Why?

You can follow the steps below and modify them as needed for one-time or short-term volunteer situations. For projects that require a group of volunteers, such as a corporate or church group, the interview may be conducted with one representative of the group instead of each individual.

- Thank the applicant for his or her interest in your organization.
- Let the applicant know the purpose of the interview and the topics to be covered.
- Provide a brief background of your organization.
- Clarify information from the application and let the applicant discuss his or her background.
- Explain your organization's expectations of volunteers (some of this discussion may need to occur after you've identified the specific position for the prospect).
- Ask about the applicant's interests and aspirations in volunteering.
- Ask about the necessary skills needed for the position.
- Ask the applicant any questions that will help you make an appropriate placement.
- Ask the applicant about any activities in which he or she would not like to be involved (e.g., public speaking).
- Ask the applicant if he or she has any questions or concerns.
- Agree on the next steps (e.g., review credentials and references and call back).

Some questions are inappropriate or illegal to ask in an interview. Ask questions only directly related to a prospect's ability to perform specific volunteer positions. Avoid asking questions about age, birthplace, height and weight, marital status, national origin, arrest record, race, or sexual orientation.

Screen Volunteers

Use screening techniques throughout the volunteer placement process, from creating position descriptions with specific qualifications to conducting effective interviews and requesting background checks. Screening can simplify the placement of volunteers and help ensure that you place the best volunteer candidate in each position. Establishing a basic screening process also helps to reduce risk and protect your organization's reputation, clients, and staff.

Sample Questions for References

- In what capacity have you known the applicant and for how long?
- What strengths would this person bring to the volunteer position?
- How does the candidate handle frustration while on the job?
- Are you aware of any reason this person should not be considered for a volunteer position?

To set up a screening process for potential volunteers, ask yourself, does your organization

- Assess all volunteer positions for the degree of possible risk and liability?
- Subject all applicants to a basic screening process consisting of applications and agreements, face-to-face interviews, and background checks?
- Follow up on references? (Don't assume that applicants only supply the names of people who will speak well of them.)
- Request police records and criminal checks when appropriate?
- Request verification of licensure or educational credits when required for the volunteer position?

Background and personal reference checks are especially important when screening volunteers to provide care to vulnerable individuals. Your organization should consider establishing policies and procedures for background checks based on the populations being served and the volunteers' responsibilities. Consider what sorts of background checks will be conducted for each position and by whom and whether you will need to check fingerprints, driving records, and criminal records. Appendix B includes a chart that lists various types of background checks and sources of information.

For a fee, background investigation services will screen volunteers or provide you access to proprietary databases to assist you in screening. Whether your organization screens applicants or hires an agency to screen them, you must have volunteer applicants sign a consent form (see the sample form in Appendix A). They need to indicate that they know a background check will be performed.

Risk Management and Liability Reduction

Risk management and liability reduction issues are important considerations when working with volunteers. Screening applicants is only one part of risk management. Other steps are needed to protect your organization from unexpected or unfortunate incidents.

You need to establish a risk management plan before volunteer activities begin. Your organization needs a risk management plan, because it helps protect everyone involved in the volunteer program from personal harm, property loss, and lawsuits. Your organization's leaders, staff, and volunteers should be part of the risk management process and be aware of your policies and procedures.

When developing a risk management plan for your volunteers,

- Review and update your organization's insurance coverage
- Review your State restrictions and regulations regarding children and youth
- Establish and follow consistent screening procedures for all volunteers
- Ask volunteers to sign volunteer agreements and liability waivers
- Establish effective supervision procedures for all volunteers
- Orient and train volunteers before they begin their work.

To stress the importance of risk management, your volunteer training should address the most likely causes of accidents or liability. You also need to review how your organization supports volunteers to minimize the chance of a problem occurring. In addition, discuss rules that volunteers must agree to follow (e.g., have a security guard escort them to their car after dark). Make it clear that not following the prescribed rules can affect the organization's success and can be grounds for termination.

In one example of reducing liability, Peace Corps staff in several African countries determined that a large number of volunteer accidents and deaths involved motorbikes. Therefore, they created a policy that volunteers could not drive or be a passenger on a motorbike. Volunteers who ignored this policy were terminated instantly and sent home. By incorporating this policy into volunteer agreements and trainings, Peace Corps staff greatly reduced accidental injuries.

Volunteer Contracts or Agreements

Some organizations find it helpful to establish a contract or agreement with new volunteers. This document can include, for example, the frequency with which volunteers are expected to work, submit reports, and attend trainings. It also can outline important policies (e.g., dress code, professional conduct, confidentiality, ethics) and responsibilities. Discuss this information in detail with the volunteer during the interview and at trainings. Ask the volunteer to sign the document to indicate that he or she fully understands and agrees with your organization's expectations. Appendix A includes a sample volunteer agreement.

Resources*

Ellis, S.J. *The Volunteer Recruitment (and Membership Development) Book*, 3rd ed. Philadelphia: Energize, Inc., 2002.

Graff, L. *By Definition: Policies for Volunteer Programs*. Philadelphia: Energize, Inc., 1994.

Graff, L.L. *Beyond Police Checks: The Definitive Employee and Volunteer Screening Guidebook*. Dundas, Canada: Linda Graff and Associates, 1999.

Little, H. *Volunteers: How To Get Them, How To Keep Them*. Naperville, IL: Panacea Press, 1999.

Maryland Governor's Office on Service and Volunteerism, www.gosv.state.md.us/volunteerism/publications.asp.

McBee, S. *To Lead Is To Serve: How To Attract Volunteers & Keep Them*. South Fallsburg, NY: Shar McBee, 2002.

Nonprofit Risk Management Center. *Staff Screening Tool Kit: Building a Strong Foundation Through Careful Staffing*, 2nd ed. Washington, DC: Nonprofit Risk Management Center, 1998. (www.nonprofitrisk.org/pubs/scrn_s.htm)

Pinsoneault, D. *Attracting and Managing Volunteers: A Parish Handbook*. Liguori, MO: Liguori Publications, 2001.

Points of Light Foundation & Volunteer Center National Network, www.1-800-volunteer.org.

* The views, opinions, and content of these resources are those of the citation and do not necessarily reflect the views, opinions, or policies of SAMHSA or DHHS.

Rapsheets, criminal records on the Internet, www.rapsheets.com.

Risk Management Resource Center, www.eriskcenter.org.

Rusin, J.B. *Volunteers Wanted: How To Get and Keep Good Volunteers*. Mobile, AL: Magnolia Mansions Press, 1999.

Tremper, C., and Kostin, G. *No Surprises: Controlling Risks in Volunteer Programs*. Washington, DC: Nonprofit Risk Management Center, 1993.

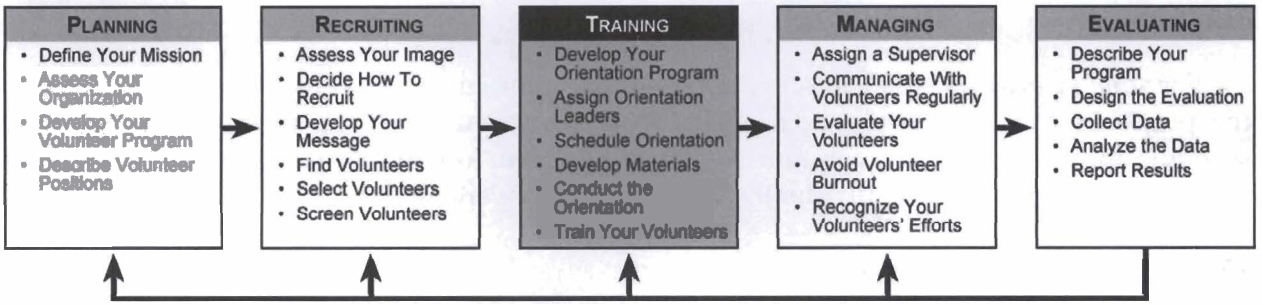
US Search.com, public information, www.ussearch.com.

Volunteer Select, criminal background service for nonprofit organizations, www.volunteerselect.com.

Wilson, M. *How To Mobilize Church Volunteers*. Minneapolis, MN: Augsburg Fortress Publishers, 1990.

* The views, opinions, and content of these resources are those of the citation and do not necessarily reflect the views, opinions, or policies of SAMHSA or DHHS.

Chapter 3: Training



Believe, when you are most unhappy, that there is something for you to do in the world. So long as you can sweeten another's pain, life is not in vain.

Helen Keller

To have highly effective volunteers, your organization needs an orientation and training program. Initial orientation and training prepare volunteers to perform their duties efficiently and effectively. Your policies and procedures form the basis of the orientation, and your position descriptions form the basis of the training.

Develop Your Orientation Program

An orientation to your program will help volunteers see how their position fits within the context of the organization. By seeing how their tasks forward the mission of the organization, volunteers will find meaning in tasks that otherwise might seem menial. In addition, treating volunteers as part of your organization's staff helps them feel they are part of a team, fosters commitment and retention, and improves the quality of their work and the services your organization provides.

Also keep in mind that volunteers represent your agency to the public. The more they know and understand about the nature of your operations and your cause, the more they can contribute to public relations, marketing, and advocacy. Thus, orientation serves multiple purposes. For an effective orientation, you will need to determine who will conduct the orientation, when it will take place, and what materials will be needed.

Assign Orientation Leaders

Usually a staff trainer or the volunteer manager conducts orientation. You also could ask experienced volunteers or staff members to mentor and orient new volunteers, thus giving existing personnel an opportunity to refresh their knowledge about your organization. In addition, lay leaders can conduct volunteer orientation as part of their ongoing tasks.

Schedule Orientation

To minimize the potential for problems, schedule an orientation session with each volunteer before he or she begins working. Orientation can be scheduled in several ways. If you are engaging a large group of volunteers for a major event or an ongoing program, you might want to schedule group orientations. You can offer several dates and times from which volunteers can choose.

For smaller projects, you can schedule small group orientations when everyone working on the project is available. For ongoing tasks, you can schedule rolling orientations. A rolling schedule involves orienting volunteers as they join your organization. An orientation leader meets with each volunteer individually at a mutually convenient time.

Develop Materials

To ensure understanding of and compliance with program policies and procedures, provide each volunteer with a written resource. You can create a volunteer handbook, orientation packet, or other reference guides. Provide this written resource during the volunteer's orientation or during his or her induction into your program.

The resource should include a glossary of terms and an index to codes and abbreviations used by the organization. It should reinforce information presented in training and address questions that arise during volunteer service. It also can be used as a supervisory tool to deal with performance issues. Other contents will depend on your organization. A sample outline follows.

Sample Volunteer Handbook Outline

I. Background on Your Organization
   - A. History
   - B. Mission, goals, and objectives
   - C. Culture and language of the organization
   - D. Programs and clients served
   - E. Major events and activities

II. Organizational Structure
   - A. Organization chart
   - B. Board of directors
   - C. Key staff
   - D. Position descriptions
   - E. Types of tasks or other ways in which volunteers contribute

III. Facilities
   - A. Location of restrooms, supplies, and equipment
   - B. Storage of personal belongings
   - C. Parking

IV. Procedures
   - A. Service requirements
   - B. Check-in procedures
   - C. Arrangements for breaks, meals, and refreshments
   - D. Recordkeeping
   - E. Training opportunities
   - F. Continuation/termination policies
   - G. Evaluation procedures

Conduct the Orientation

During the orientation, introduce the volunteer to staff and other volunteers and provide a tour of the facility. Then, review the volunteer handbook or guide, focusing on the volunteer's duties and the policies and procedures. Allow ample time for questions.

In addition to giving the volunteer the handbook, you also might want to provide him or her with brochures, factsheets, or other helpful information about the work of your organization, as well as a map of the facilities and a phone list. Be sure to review the details regarding any specific projects in which the volunteer may be involved.

Train Your Volunteers

Training gives volunteers the direction and skills they need to carry out their assigned tasks. Typically, training is provided by the staff in the area of the organization in which the volunteer is assigned. In general, training should be

- Specific to the requirements of the volunteer position
- Geared to the skill level of the volunteer
- Ongoing
- Specific to the needs identified by both the volunteer and supervisor
- Periodically evaluated to determine if it is on track.

Training also is a form of recognition and serves to keep a volunteer motivated and committed and performing the quality of service you expect. Sending a volunteer to a special class or conference can be a reward for service. The class does not have to be related directly to the volunteer's assignment but can be of broad interest to your organization, such as CPR training, public speaking, conflict resolution, or team building.

The Alcohol/Drug 24-Hour Help Line

The Alcohol/Drug 24-Hour Help Line (ADHL) is a confidential, statewide telephone service in Washington State providing assistance and guidance for people with alcohol- and drug-related problems. ADHL staff are assisted by part-time employees and a corps of about 50 volunteers and 25 volunteers-in-training. ADHL has its own volunteer training program.

Resources*

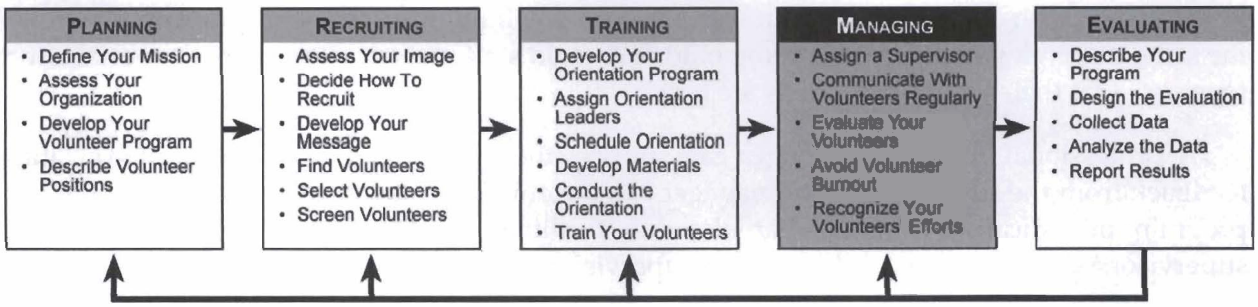
Lee, J.F.; Catagnus, J.M.; and Ellis, S.J., eds. *What We Learned (the Hard Way) about Supervising Volunteers: An Action Guide for Making Your Job Easier.* Philadelphia: Energize, Inc., 1998.

Maryland Governor's Office on Service and Volunteerism, www.gosv.state.md.us/volunteerism/publications.asp.

Points of Light Foundation & Volunteer Center National Network, www.1-800-volunteer.org.

* The views, opinions, and content of these resources are those of the citation and do not necessarily reflect the views, opinions, or policies of SAMHSA or DHHS.

Chapter 4: Managing



In every community there is work to be done. In every nation there are wounds to heal. In every heart there is the power to do it.

Marianne Williamson

Just because volunteers don't get paid, it doesn't mean they don't work. Manage your volunteers the way you manage your staff. Give them the support they need to perform their duties by designating a supervisor to whom they can turn for advice, guidance, and feedback. Supervisors need to provide the materials, training, direction, and encouragement to enable volunteers to perform their assigned tasks.

Assign a Supervisor

A supervisor is responsible for getting a job done by enabling others to do the work. The most important responsibility of a supervisor of volunteers is to create an environment that empowers volunteers to perform their duties. Empowered volunteers are willing to take responsibility for what they are doing, contribute more than expected, and perceive themselves as important members of the organization's staff.

Empower volunteers by providing them with the following:

- Sufficient orientation to the organization
- Clear and appropriate expectations
- Proper training and equipment
- Ongoing communication
- Evaluation of performance
- Regular reinforcement and recognition.

Volunteers want and need to be held accountable for their performance. An effective supervisor should be concerned that volunteers have confidence in themselves, are satisfied with their level of contribution, and can grow personally and professionally through their

service. The supervisor can provide the orientation, review expectations, and arrange for training and equipment.

Communicate with Volunteers Regularly

The supervisor should be both willing and able to oversee volunteers. Not everyone knows how to work with and motivate volunteer personnel. Although supervisors may apply many of the same principles whether overseeing paid or unpaid staff, they must put forth a special effort to ensure that their volunteers' needs are met.

A professional volunteer manager can support the supervisors of volunteers by eliciting feedback from the supervisors. The manager can use this information to evaluate the volunteer program periodically. The manager also can facilitate the sharing of experiences among supervisors and showcase good volunteer supervision.

Ongoing communication with volunteers is important. Supervisors need to develop positive relationships with volunteers and convey that the organization needs and values their contribution. In addition to sharing information with volunteers, supervisors should take the time to gather the volunteers' input. Supervisors can ask volunteers about what clients and community members need and want, how people view the organization, and what can be done to improve its image. By seeking input from volunteers regularly, supervisors can get information that will help the organization better use volunteers and serve the community.

Supervisors are not the only ones who need to communicate with volunteers. The volunteer manager or coordinator also should get involved. This person should ask volunteers how they feel about their work, what help they need, and whether their supervisor supports them adequately. Organizations should convey their appreciation for volunteers from the top, down.

Evaluate Your Volunteers

Efforts to evaluate your volunteers' performance and share the results show that you care about your volunteers and the quality of their work. You can evaluate volunteers the same way you evaluate paid staff, using the same terms, schedule, forms, and types of discussions.

Ideally, your system for evaluating volunteers should have (1) a policy on performance appraisal and review, (2) a trial period before volunteers are a part of the organization officially, (3) a regularly scheduled meeting to discuss job performance and satisfaction, and (4) a method for reviewing commitments to change made during the evaluation meeting. The evaluation system should be explained to volunteers during their orientation session and should be reviewed with each staff person who will be supervising volunteers.

The evaluation session gives the volunteer's supervisor a chance to talk about the volunteer's performance. It also gives the volunteer a chance to discuss the volunteer position and suggest changes. The evaluation should include a review of past performance, discussion about the present, and plans for the future (e.g., is the volunteer interested in a different position, more responsibility, a change of schedule?). The evaluation session is also a good time to review the volunteer's job description to see if it correctly describes his or her work.

Some of your volunteers may have performance problems that require attention. If so, follow these guidelines:

- Keep the tone serious
- Remember to give feedback on an ongoing basis so that the evaluation is not a surprise
- Be specific about the areas in which the volunteer needs improvement
- Let the volunteer know that you and the program expect quality performance
- Include any positive information to balance with the negative
- Set mutually agreed-upon goals for improvement
- Offer additional training if appropriate and available
- End the session on a hopeful note.

As is the case with staff, evaluating your volunteers, giving them feedback about their performance, and discussing needed changes can help them do a better job. Ultimately, your organization, volunteers, staff, and clients will benefit from your efforts.

Avoid Volunteer Burnout

For the same reasons that retention of paid staff is vital to an organization's continuity, volunteer retention is key. Good retention reflects a healthy organization. So, before your organization experiences unnecessary "turnover," consider the characteristics that make an organization an encouraging and supportive place to work and the steps you can take to retain your staff and volunteers.

Thinking about jobs you've held in the past and detailing the reasons you either enjoyed them or disliked them can provide insight into what makes for a positive work or volunteer experience. Some conditions that can have a positive effect on volunteer retention include the following:

- Being well-oriented to the workplace
- Having available training and ongoing educational opportunities
- Having meaningful work with specific responsibilities
- Having a dedicated space and the necessary resources
- Being respected
- Having available support, such as child care so that stay-at-home moms can volunteer or ongoing meetings to exchange information and offer volunteer support
- Being recognized for work done.

Treat your volunteers with respect and help them feel valued. Do not take them for granted or assume that they always will be available. A theory called the "Pareto Principle," or "80/20 Rule," can be applied to a variety of scenarios related to management. When applied to volunteers, the rule states that 20 percent of the volunteers are responsible for 80 percent of the results. In other words, most volunteers help out now and then, while a smaller core group does the bulk of the work. Members of that core group can burn out and leave your organization permanently. Some of them may criticize your organization and advise others not to get involved.

Avoiding Burnout: Questions for Volunteers

Do you...

- Have higher standards than most people?
- Tend to be more self-critical than self-accepting?
- Feel taken for granted or discouraged in your work?
- Postpone requests or say, "I'll get to it," instead of saying no?
- Have trouble delegating tasks that you enjoy, knowing that others could complete them just as well or almost as well as you can?
- Fall back on the phrase, "Well, somebody has to do it," when taking on yet another volunteer commitment?

If you said yes to any of the questions, you might be experiencing burnout. It might be time to do the following:

- Take a step back
- Try something new
- Delegate tasks
- Celebrate accomplishments
- Seek outside organizational help.

Source: Adapted from Ontario Rural Council, 2002.

How can you avoid burnout and keep a large group of committed volunteers active for a long time? Be aware of the symptoms of burnout, which may include anger, hostility, loss of energy, loss of creativity, loss of satisfaction, and a sense of purposelessness. If your volunteers seem unhappy, they probably are. You might want to ask them some questions and discuss the matter before your organization loses them entirely.

Recognize Your Volunteers' Efforts

Recognition and expressions of thanks are not just polite. They are needed on an ongoing basis to show appreciation for your volunteers' efforts. One of the most important ways to recognize volunteers is to treat them with respect and give them support and praise throughout the year. A few general principles for saying "thank you" frequently, specifically, and personally are as follows:

- Deliver the recognition in a personal and honest manner. Avoid recognition that is too overproduced or rehearsed.
- Tailor recognition and reward to the unique needs of the people involved. By having various recognition and reward options, you can acknowledge accomplishments in ways appropriate to a given situation or volunteer.
- Give rewards on an ongoing basis and close in time to the contribution you're recognizing.
- Have a clear message. Explaining the reasons for the rewards and the criteria used to determine them will ensure that volunteers see a clear connection between accomplishments and recognition.

Volunteer Profile: Leon

Location: Seattle, Washington

Target Population: Individuals who are homeless, addicted, and mentally ill

Position/Responsibilities: Administrative personnel and teaching faculty

Manager's Comments: Three years ago, Leon was invited to tour our facilities by one of our supporters and returned to observe a recovery class in our treatment program. Since then, Leon has returned to our program nearly every day, working 35 to 40 hours a week. His arrival coincided with the departure of our staff person responsible for operations. Leon has prepared payables, researched and written grants, and prepared return correspondence to our donors. He also has helped organize our events and fundraisers and has worked with our advocacy staff as the first and ongoing point of contact with clients as they enter our facility. In addition, Leon has taught classes on "Money, the Market, and Finance," helping our clients understand and prepare personal budgets, clean up bad credit, and address other financial needs. We do not know what we would have done for the past 3 years if Leon had not stopped by for a visit one day.

Volunteer recognition need not be an expensive affair. With creativity and effort, you can find a variety of ways to celebrate volunteers and spotlight their impact on the community. The most common methods include the following:

- *Annual events,* such as receptions, luncheons, dinners, and award ceremonies.
- *Media coverage,* which spreads the word about the good work of your volunteers and your organization. You can arrange newspaper interviews or stories or write letters to the editor. A good time for coverage is during National Volunteer Week, which generally occurs the third week of April, from Sunday to Saturday.
- *Gifts.* Giving t-shirts, coffee mugs, and other items displaying your organization's logo helps encourage a feeling of belonging. Other items may include movie passes, tickets to concerts or sporting events, or gift certificates for a seated massage or manicure.
- *National Volunteer Week events.* This week is set aside to honor people who donate their time and energy to various organizations and causes. You might want to use this week as a special time to recognize volunteers.
- *Special celebrations.* You can create your own celebration schedule to recognize birthdays, special milestones, and holidays.

Volunteer Award

ABC Organization thanks

_____

for outstanding service.

Jane Doe
President
Date

Recognition Tips

- Say thanks. Doing so is cheap and easy, and the results can be pure magic.
- List new volunteers and volunteer service anniversaries on your organization's Web site or in your organization's newsletter or bulletin.
- Surprise your volunteers. Deliver some gesture of appreciation they don't expect. For example, send cards on their birthday and holidays.
- Organize a volunteer-of-the-month program with special recognition and benefits.
- Pay personal attention to volunteers. Take time to get to know what is happening in their lives, and then make an effort to ask them about it next time you see them.
- Offer small rewards, such as soft drinks, a box lunch, a t-shirt, or tickets to a movie.
- Give volunteers written testimony from clients, staff, and important people in the community who have noticed their contributions.
- Host a volunteer party or have a recognition ceremony.
- Consider ways to recognize volunteers publicly within community newspapers or house of worship bulletins.

Resources*

Charity Channel, guidance on managing and recognizing volunteers, www.charitychannel.com.

Cutshall, S., and Frederick, R. *Treat Em Right: Tasty Ideas for Encouraging Volunteers.* Cincinnati, OH: Standard Publishing Company, 1999.

Guidance Channel, volunteer appreciation specialty gifts, sales.guidancechannel.com/.

Little, H. *Volunteers: How To Get Them, How To Keep Them.* Naperville, IL: Panacea Press, 1999.

McBee, S. *To Lead Is To Serve: How To Attract Volunteers & Keep Them.* South Fallsburg, NY: Shar McBee, 2002.

Pinsoneault, D. *Attracting and Managing Volunteers: A Parish Handbook.* Liguori, MO: Liguori Publications, 2001.

Points of Light Foundation & Volunteer Center National Network, National Volunteer Week, www.pointsoflight.org/programs/seasons/nvw/.

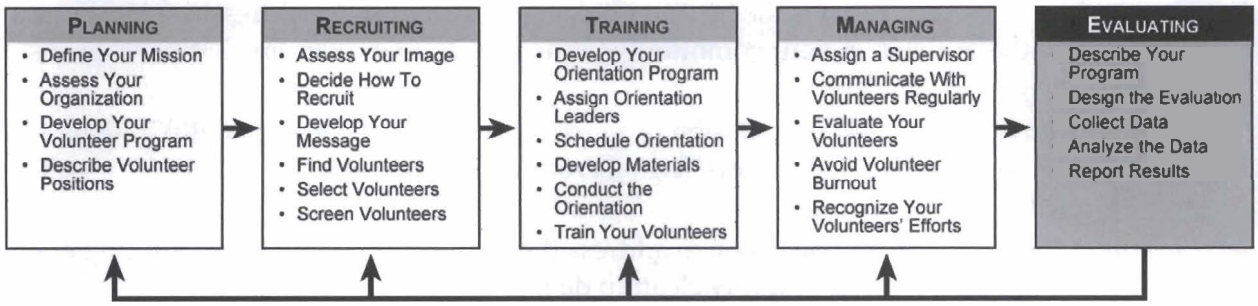
Points of Light Foundation & Volunteer Center National Network, volunteer management catalog, online.pointsoflight.org/source/orders/index.cfm?section=orders&task=0.

Rusin, J.B. *Volunteers Wanted: A Practical Guide to Finding and Keeping Good Volunteers.* Mobile, AL: Magnolia Mansions Press, 1999.

Vineyard, S., and McCurley, S. *Best Practices for Volunteer Programs.* Downers Grove, IL: Heritage Arts Publishing, 2001.

* The views, opinions, and content of these resources are those of the citation and do not necessarily reflect the views, opinions, or policies of SAMHSA or DHHS.

Chapter 5: Evaluating



A pessimist, they say, sees a glass of water as being half empty; an optimist sees the same glass as half full. But a giving person sees a glass of water and starts looking for someone who might be thirsty.

G. Donald Gale

Program evaluation is key to finding out if what your organization is doing works and if your clients are satisfied. Volunteer researchers, evaluators, and graduate students can benefit your organization by assisting with the program evaluation process. A good program evaluation can help your organization in many ways:

- Provide direction to the board and staff
- Inform program improvements
- Support strategic planning
- Identify the need to reallocate financial resources or staff, including volunteers
- Support funding applications.

Evaluation may seem daunting, but it basically involves five steps:

- Describing your program
- Designing the evaluation
- Collecting data
- Analyzing the data
- Reporting results.

Get Started with Your Program Evaluation: Describe Your Program

First, you need to develop a clear and succinct description of your program. Include the purpose and activities, and if your program relies on volunteers (e.g., for a mentoring program), include that information. The idea is to ensure that everyone has the same understanding about

the program's components, implementation, and intended results. You might want to evaluate your volunteer program by itself. If so, limit the description to what your volunteers do and how your volunteer program operates.

Your description should include the following components:

- *The need for the program.* What is the health problem your program is addressing? How significant is the problem in your community? Who are your target groups? What changes or trends have been observed?
- *Goals and objectives.* What is your mission (e.g., reduce alcohol use among youth)? What specific results do you want to achieve (e.g., increase participation in afterschool programs by 50 percent)?
- *Program activities.* What are you doing to address the problem (e.g., providing tutoring after school, engaging youth in community cleanup days)?
- *Program resources.* Who are your staff (including volunteers)? What materials and equipment do you have?
- *Stage of development.* Is your program in the planning stages? Is it under way? Have you seen any measurable results?

If you are focusing on an evaluation of your volunteer program, include an evaluation of your volunteer training sessions. To ensure that your training is effective, comprehensive, and well received, evaluate each session across four areas:

- *Reaction* – How does the learner feel about the training?
- *Learning* – What knowledge did the learner gain?
- *Behaviors* – What skills did the learner develop?
- *Results and effectiveness* – What results occurred? Did the learner effectively apply the new skills to the necessary tasks in the organization?

Determining results and effectiveness is the most desired outcome of a training evaluation, but it's usually the most difficult to accomplish. Evaluating effectiveness often involves the use of measures you can see, such as faster output from a machine after an operator receives training. It can be harder to see the results of volunteer training, but there are some steps you can take to develop an effective program. For example, ask these questions:

- Will the selected training and development methods result in volunteers learning the knowledge and skills needed to perform their tasks? Have other volunteers used the methods and been successful? Consider testing the methods with a highly skilled volunteer and asking for feedback.
- Do the methods conform to the volunteers' preferences and learning styles? Have volunteers briefly review the methods (e.g., documentation, overheads). Do they have any trouble understanding the material?

Design the Evaluation

Evaluation involves reviewing and documenting the effects of your services and their importance to the community. Evaluations vary in their level of sophistication and complexity, depending on the program and available time, money, and other resources. At the most basic level, an evaluation may involve the review of service records for their results (e.g., hours worked, calls made, outcomes). If more time and financial resources are available, you may create surveys or questionnaires, hold interviews, or conduct focus group meetings. At higher levels of sophistication, factors such as scientific random sampling may become important to the results.

To design your evaluation, follow these steps:

- State the purpose of the evaluation, such as improving the program, assessing effectiveness, or demonstrating accountability for resources.
- Define the users of the evaluation results, such as clients, staff, volunteers, or funders.
- Define the uses of the evaluation results, such as identifying areas of improvement, deciding how to allocate resources, assessing community needs, or mobilizing community support.
- Develop evaluation questions:
  - Use process evaluation questions to document program implementation, such as number of people receiving services, amount of money used, funding sources, staffing and use of volunteers, and number of events.
  - Use outcome evaluation questions to document short-term and long-term results, such as changes in knowledge and behavior.
  - Use training evaluation questions to determine whether training is effective. During training sessions, ask volunteers how they are doing. Do they understand what's being said? Can they explain the main points in their own words? Note whether volunteers are taking part in the activities enthusiastically. Are they coming late or leaving early? Also ask volunteers to rate the activities from 1 to 5. If they give a rating of less than 5, ask them how the activity could be improved.

Collect Data

Before choosing outcomes to measure, ask yourself three key questions:

- Is it reasonable to believe the program can influence the outcome?
- Would measurement of the outcome help identify program successes or areas for improvement?
- Would the program's stakeholders accept the outcome as valid?

Your outcome measures should be relevant to the goals and objectives, indicative of meaningful changes, capable of being influenced by your program, realistic, useful in identifying successes and problems, and effective in representing changes attributable to your program. Once you have identified outcome measures that meet these criteria, the next step is to identify indicators.

Sample Evaluation Plan

- ***Evaluation design.*** Describe the program (goals/objectives) and then identify measures or indicators to determine whether and to what extent the program met its goals and objectives. Process evaluation can be used to describe key players, activities, accomplishments, and lessons learned from implementing the program. Outcome evaluation can be used to assess the effects of the program on the target population (clients) using a preprogram, postprogram, and followup design (6 months to 12 months after program completion).
- ***Data collection.*** Identify data sources and instruments for collecting information. Primary sources include the people you'll interview or mail a form to (surveys or in-person interviews) or talk to in a focus group. Secondary sources include written materials, such as client records and reports.
- ***Data management and analysis.*** Enter data into a database and perform quantitative analysis and qualitative (content) analysis.
- ***Reporting.*** For the process evaluation, use case studies—stories or histories of the program that describe key players, activities, accomplishments, major assets and challenges, and important lessons learned. These stories will highlight volunteer involvement and achievements. For the outcome evaluation, use tables to present results and highlight the most important findings. Interim reports (e.g., every 6 months or year of the program) and a final report would be helpful for both the program director and staff and any funding organization.

Indicators are specific, observable, and measurable changes that show the progress a program is making toward an outcome. Common indicators include participation rates, attitudes, and behavior. You also might look at community norms, policies, and health status, although these may be difficult to attribute to your program given all the factors that can influence community change. However, you might be able to show that your program played a part in affecting these indicators.

After identifying the type of data you want to collect, identify data sources, including clients, program participants, staff, volunteers, funders, policymakers, and other stakeholders or interested parties. Written sources include grant proposals, newsletters, meeting minutes, registration forms, quarterly reports, journal articles, previous evaluations, database records, and photos and videotapes. You also can observe meetings, events, and service encounters.

Develop data collection instruments, such as survey or interview forms, to ensure uniformity in your data collection. Also develop procedures for collecting written materials, such as participant sign-in sheets or registration forms. You may want to create a database of participant information that you can use to generate evaluation data (e.g., number of mentors, number of people attending training sessions). In addition, it's a good idea to collect data on the number of hours volunteers work. By calculating the amount of money your organization saves through its volunteer program (volunteer hours multiplied by the market rate per hour), you can show funders that your volunteers are offsetting costs.

Create a log to document contacts. Tracking the process of each contact from beginning to end will help you determine the cost and time involved in collecting data. If you use volunteers to analyze data, you should include their time in the total cost of the evaluation.

Inform your data collectors of what you are trying to achieve. Uniform collection of data and continuity of the process are important. Monitor results at least quarterly, although monitoring them monthly would be even better. Difficulties, such as an unusually low response rate, refusal to answer questions, or the collection of incomplete data, can jeopardize the results seriously.

Quantitative factors cannot tell the whole story of your program. You may want to include some methods of evaluation that involve qualitative factors. Ask for testimonial letters from clients or other agencies about how your services improved their lives or operations. You also can have your clients complete satisfaction surveys that include a space for comments.

Sample Testimonial: Doretha

My professional career has taken me away from teaching, so when I saw that there was a need for tutors, I applied. After successfully completing training, I was paired with a woman from China named Shao. When we began working together we worked strictly from the grammar book, but as Shao became more comfortable with me she began to bring extra work to our lessons, from interpreting junk mail messages ("You may already be a winner!") to questions about her daughters' homework. I am now good friends with Shao and her family and Shao's English and math skills have greatly improved.

For training evaluations, several options are available:

- Give each volunteer a test before and after the training and compare the results
- Interview each volunteer before and after the training and compare the results
- Watch volunteers perform their tasks and assess their proficiency
- Assign an expert evaluator from inside or outside the organization to evaluate the volunteers' knowledge and skills
- Get ongoing feedback from the volunteers, trainers, and supervisors to determine whether the volunteers gained the intended knowledge and skills and to identify needed improvements to the training.

Analyze the Data

After collecting the data, you need to analyze them to determine what they show about your program. At a minimum, you should tabulate key numbers, such as number of participants, number of participants achieving an outcome, and percentage of participants achieving the outcome. Use comparisons when possible. For example, show the difference in grades between participants in your Sunday youth group and nonparticipants.

In analyzing the data, be aware of factors that can influence outcomes, such as changes in staffing, program operations, or scope of service. Environmental factors, such as failure of the economy or natural disasters, also can influence outcomes. You can include an explanation of these factors with the results of the evaluation.

Report Results

Once you analyze and interpret your findings, you need to report them and make recommendations for action. Potential audiences for recommendations include staff and volunteers, policymakers, potential funders, organizational members, and congregants. For example, you might find that your volunteer program is effective but understaffed; as a result, you might recommend that more members of your organization or congregation volunteer.

It is important to document your findings in a formal report. The report must communicate information about the evaluation clearly, succinctly, and impartially. Resist the temptation to make excuses for negative outcomes. Indicate what problems arose, why they occurred, and what modifications can resolve them. The information might spur action among community members who see the potential for a program to be more effective.

Sample Evaluation Report Outline

I. Executive Summary
II. Background and Purpose
   A. Program background
   B. Evaluation rationale
   C. Program description
III. Methods
   A. Design
   B. Measures
   C. Data collection procedures
   D. Data processing procedures
   E. Analysis
   F. Limitations
IV. Results
V. Discussion and Recommendations
VI. Appendixes (e.g., data tables)

You can use the report to demonstrate the effectiveness of your program, develop your budget, and justify resource allocations. You also can use the information to compare outcomes with previous years and to compare actual and intended results. If your evaluation shows especially positive results, it can be a good tool for promoting your program, especially to potential funders and volunteers.

Resources*

Grantmakers Evaluation Network, www.hogg.lac.utexas.edu/gen.

Hernandez, G., and Visher, M.G. *Creating a Culture of Inquiry: Changing Methods – and Minds – on the Use of Evaluation in Nonprofit Organizations.* San Francisco: James Irvine Foundation, 2001. www.irvine.org/assets/pdf/pubs/evaluation/Creating_Culture.pdf [Accessed August 24, 2004].

National Network for Health, www.nnh.org/products/eval1-2.htm.

Outcome Measurement Network, www.unitedway.org/outcomes/.

Spiegal, R.A. *Accountable Good: Program Evaluation in the Nonprofit Sector.* Washington, DC: The Advisory Board Foundation, 1999.

W.K. Kellogg Foundation. *W.K. Kellogg Foundation Evaluation Handbook.* Battle Creek, MI: W.K. Kellogg Foundation, 1998. www.wkkf.org/Pubs/Tools/Evaluation/Pub770.pdf [Accessed August 24, 2004].

* The views, opinions, and content of these resources are those of the citation and do not necessarily reflect the views, opinions, or policies of SAMHSA or DHHS.

W.K. Kellogg Foundation. *W.K. Kellogg Foundation Logic Model Development Guide*. Battle Creek, MI: W.K. Kellogg Foundation, 2001. www.wkkf.org/Pubs/Tools/Evaluation/Pub3669.pdf [Accessed August 24, 2004].

* The views, opinions, and content of these resources are those of the citation and do not necessarily reflect the views, opinions, or policies of SAMHSA or DHHS.

Appendix A:
Sample Forms and Worksheets

Organizational Self-Assessment Form

Organization: _____

Mission: _____

Total Number of Volunteers: _____

Number of General Volunteers (e.g., people who handle administrative tasks): _____
Number of Skill-Specific Volunteers (e.g., Web designers): _____
Number of Pro Bono Volunteers (e.g., financial advisors, attorneys): _____

Volunteer Roles/Positions: _____

_____

_____

Recruitment Methods: _____

_____

_____

Recruitment Sources: _____

_____

_____

Organizational Qualities Attractive to Volunteers: _____

_____

_____

Gaps in Service That Volunteers Could Fill: _____

_____

_____

Barriers (e.g., staff resistance): _____

_____

_____

Staff Available To Supervise Volunteers: _____

_____

_____

Volunteer Position Description Worksheet

Component	Description
Job Title	
Purpose	
Key Responsibilities	
Location	
Supervision	
Length of Appointment	
Time Commitment	
Qualifications	
Benefits	
Support Provided	

Source: Adapted from McCurley and Lynch, 1996. Copyright © 2004 by the Points of Light Foundation & Volunteer Center National Network. Used by permission only. This material cannot be reproduced for wide distribution or resale in any form or incorporated into any proprietary information retrieval system, electronic or mechanical, without the written permission of the Points of Light Foundation & Volunteer Center National Network.

Volunteer Application Form

Name _____

Address _____ City _____ State _____ ZIP Code _____

Phone (Day) _____ (Evening) _____

E-Mail Address _____

Emergency Contact _____ Phone _____

Past Volunteer Experience (include organization/agency, position, supervisor phone/e-mail)

Employment (include most recent company, position, supervisor phone/e-mail)

Desired Schedule (check days and times available)

- ☐ Monday
- ☐ Tuesday
- ☐ Wednesday
- ☐ Thursday
- ☐ Friday
- ☐ Saturday
- ☐ Sunday
- ☐ Morning (9 a.m. to noon)
- ☐ Afternoon (noon to 4 p.m.)
- ☐ Evening (4 to 8 p.m.)

Frequency of volunteer availability (e.g., weekly, semiweekly, monthly) _____

Why do you want to volunteer with this organization? _____

_____

How would you like to help this organization? _____

_____

What are your hobbies, interests, and skills? _____

Education/Credentials (if over 18 years, start with high school)

School	Date	Degree	Location

References: Give the name, address, and phone/e-mail of three non–family members who can provide references on your ability to perform this volunteer position.

1. _____

2. _____

3. _____

Source: Copyright © 2004 by the Points of Light Foundation & Volunteer Center National Network. Used by permission only. This material cannot be reproduced for wide distribution or resale in any form or incorporated into any proprietary information retrieval system, electronic or mechanical, without the written permission of the Points of Light Foundation & Volunteer Center National Network.

Background Check Permission Form

I hereby allow [name of organization] to perform a check of my background, including:

- Criminal records
- Driving records
- Employment verification/volunteer history
- Credit reports
- Educational/diploma verification
- Personal referencesand other persons or sources as appropriate for the volunteer job in which I have expressed an interest.

I understand that I do not have to agree to this background check, but refusal to do so may exclude me from consideration for some types of volunteer positions and that all such information collected during the check will be kept confidential.

I hereby also extend my permission to those individuals or organizations contacted for the purpose of this background check to give their full and honest evaluation of my suitability for the described volunteer work and other such information, as they deem appropriate.

Signed _____ Date _____

Source: Adapted from McCurley and Lynch, 1996. Copyright © 2004 by the Points of Light Foundation & Volunteer Center National Network. Used by permission only. This material cannot be reproduced for wide distribution or resale in any form or incorporated into any proprietary information retrieval system, electronic or mechanical, without the written permission of the Points of Light Foundation & Volunteer Center National Network.

Volunteer Agreement

The volunteer agreement is intended to ensure an understanding between volunteer managers and volunteers of the volunteer position description and the organization's policies and procedures.

Volunteer Agreement

Agency

We, _____[agency name], agree to accept the services of _____[volunteer name] beginning _____[date].

And we commit

1. To provide accurate information, training, and assistance
2. To ensure supervision and provide job assessment and feedback
3. To respect the skills and individual needs of the volunteer.

Volunteer

I, _____[volunteer name], agree to serve as a volunteer and commit

1. To perform volunteer duties to the best of my ability
2. To follow agency rules, policies, and procedures, including recordkeeping requirements and confidentiality of agency and client information
3. To meet time and duty commitments or to provide adequate notice so that alternate arrangements can be made.

Agreed to:

_____	_____
Volunteer	Staff Representative
_____	_____
Date	Date

Source: Adapted from MacDuff, 1996. Copyright © 2004 by the Points of Light Foundation & Volunteer Center National Network. Used by permission only. This material cannot be reproduced for wide distribution or resale in any form or incorporated into any proprietary information retrieval system, electronic or mechanical, without the written permission of the Points of Light Foundation & Volunteer Center National Network.

Appendix B:
Other Resources

Glossary

Board of Directors—The governing body of an organization that, by the authority of its articles of incorporation and bylaws, controls the affairs of that organization. The board typically sets rules and policies and determines the direction the organization will take. Boards also help with promotion, fundraising, event planning, and other activities as needed or desired.

Focus Group—A selected set of people used to test and evaluate a concept or product. Focus groups are most commonly 6 to 12 people that constitute an appropriate balance of a targeted demographic.

Mission Statement—A statement of purpose for an organization that identifies the scope of its operations and reflects its values and priorities. It helps an organization make consistent decisions, motivate, build organizational unity, integrate objectives with goals, and enhance communication.

Needs Assessment—A systematic process used to acquire an accurate, thorough picture of the strengths and weaknesses of a system or community. Findings can be used to prioritize goals, develop action plans, allocate funds and resources, and improve services.

Outcomes—Changes or results. Generally focused on people, they also can be program or institutional changes. Program outcomes generally are worded in terms of how participants will benefit.

Quantitative Data—Data that can be measured, ranked, or rated.

Qualitative Factors—Information that is not measured easily, such as an individual's comments.

Random Sampling—The selection of a mixture of the population.

Vision Statement—A succinct statement of what an organization intends to become and to achieve at some future time. Vision statements assist organizations in keeping their goals in sight without specifying the means that will be used to achieve those desired ends.

Sample Mission Statements

Volunteers of America—Volunteers of America is a national, nonprofit, spiritually based organization providing local human service programs and opportunities for individual and community involvement.

National Association for Children of Alcoholics—Advocating for all children and families affected by alcoholism and other drug dependencies.

Points of Light Foundation & Volunteer Center National Network—The Foundation's mission is to engage more people more effectively in volunteer service to help solve serious social problems.

The Michigan Interfaith Council on Alcohol Problems—The Michigan Interfaith Council on Alcohol Problems seeks to:

- Broaden the awareness of legislators, public officials, news media, and the general public to the danger of alcohol and drug problems
- Secure the passage of legislation that brings responsible controls in the areas of alcohol and other drug misuse
- Resist overt and covert pressures in the private and public domain that would ignore the safety, rights, and morality of any person or group of persons
- Alert the personal and group supporters of this organization to any public policy changes deemed undesirable for the good of the citizens of the State and to use the weight and influence of the organization to produce innovations and public policies that enhance the life of this State's citizens.

Types of Background Checks and Sources of Information

Types	Positions To Be Screened	Sources of Information
Criminal Records Use to determine if an individual has any recorded information under his or her name and date of birth pertaining to criminal convictions.	Any position in which the volunteer will: • Carry a weapon • Drive a vehicle • Have access to drugs • Have access to master keys or other security mechanisms • Work with women, children, or vulnerable clients.	County, State, and Federal courts www.volunteerselect.com www.ussearch.com www.rapsheets.com
Department of Corrections Records	Same as *Criminal Records*	Most States have a Web site where a free search can be conducted
National Wanted Fugitive Search	Same as *Criminal Records*	Most States have a Web site that lists the top wanted fugitives
Motor Vehicle Records Use to obtain information on arrest warrants issued for failure to pay traffic fines, alcohol or illegal drug convictions, and accidents.	Any position in which the volunteer will drive a vehicle.	State Department of Motor Vehicles www.volunteerselect.com www.ussearch.com www.rapsheets.com
Employment Verification Use to verify past employment listed on volunteer application, including job title, length of employment, salary, reason for termination, and rehire status.	All volunteers who have an employment history or are currently employed.	Companies and organizations listed on the volunteer's application
Credit Reports Use to obtain a credit/financial profile of an applicant (allowed under the Fair Credit Reporting Act).	Any position in which the volunteer will have access to money or valuables.	www.volunteerselect.com www.ussearch.com
Educational References and Diploma Verification	Professional volunteers.	Colleges and universities listed on the volunteer's application
Professional License Certification	Mental health volunteers, physicians, nurses, lifeguards, massage therapists, cosmetologists.	Professional organizations listed on the volunteer's application

Source: Adapted from material from the Points of Light Foundation & Volunteer Center National Network.

Statutes and Acts Related to Volunteering

Good Samaritan Statutes

Good Samaritan statutes are laws enacted by various States that protect a health care provider or other rescuer from being sued after giving emergency help to a victim, provided the person uses reasonable, prudent guidelines for care using the resources he or she has available at the time of the accident. Most States have enacted some form of Good Samaritan or volunteer protection law prohibiting a victim from suing a physician or other health care professional for injuries from a Good Samaritan action. To trigger protection from such an act, several conditions must be satisfied: It must be a volunteer act, the person receiving the help must not object to being helped, and the actions of the rescuer must be a good-faith effort to help.

The Volunteer Protection Act

The Volunteer Protection Act (VPA), Public Law 105-19, provides immunity for volunteers serving nonprofit organizations or government entities for harm caused by their acts or omissions if

- The volunteer was acting within the scope of his or her responsibilities
- If required, the volunteer was properly licensed, certified, or authorized to act
- The harm was not caused by willful, criminal, or reckless misconduct or gross negligence
- The harm was not caused by the volunteer operating a motor vehicle, vessel, or aircraft.

Despite the VPA, many volunteers remain fully liable for any harm they cause, and all volunteers remain liable for some actions. The Act only applies to 501(c)(3) organizations and government entities. In addition, the VPA does not prevent a nonprofit from bringing an action against a volunteer. Other exceptions to the liability limitation include misconduct that is a crime of violence, hate crime, sexual offense, or violation of Federal or State civil rights law and acts committed under the influence of alcohol or drugs.

References[‡]

Amery, E.A. *A Conversation with the President of the Points of Light Foundation*. OnPhilanthropy, 2001. www.onphilanthropy.com/prof_inter/pi2001-08-22h.html [Accessed August 24, 2004].

Bureau of Labor Statistics. *Volunteering in the United States, 2003*. News—United States Department of Labor. Washington, DC: U.S. Department of Labor, 2003. www.bls.gov/news.release/pdf/volun.pdf [Accessed August 24, 2004].

Independent Sector. *Giving and Volunteering in the United States: Findings from a National Survey*. Washington, DC: Independent Sector, 1999. www.independentsector.org/GandV/s_prof.htm [Accessed August 24, 2004].

Independent Sector. *Value of Volunteer Time*. Washington, DC: Independent Sector, 2004. www.independentsector.org/programs/research/volunteer_time.html [Accessed August 24, 2004].

MacDuff, N. *Volunteer Screening: An Audio Workbook*. Walla Walla, WA: MBA Publishing, 1996.

McCurley, S., and Lynch, R. *Volunteer Management: Mobilizing All the Resources of the Community*. Downers Grove, IL: Heritage Arts Publishing, 1996.

Ontario Rural Council. *The Valuing the Rural Volunteer Toolkit*. Guelph, Canada: Ontario Rural Council, 2002. www.torc.on.ca/torceng/memact/VRVToolkit.htm [Accessed August 24, 2004].

Wenger, S. Volunteers in the treatment program. *Paradigm:* 6–7, Summer 2000. www.onlineparadigm.com/archives/123-SOO_MH.AD.pdf [Accessed August 31, 2004].

[‡] The views, opinions, and content of these references are those of the citation and do not necessarily reflect the views, opinions, or policies of SAMHSA or DHHS.

Other Print Resources*

Abrahams, J. *The Mission Statement Book: 301 Corporate Mission Statements from America's Top Companies*. Berkeley, CA: Ten Speed Press, 1995.
A selection of more than 300 mission statements from America's top companies and detailed advice on how to craft one to suit the needs of your organization.

Campbell, K.N., and Ellis, S.J. *The (Help!) I-Don't-Have-Enough-Time Guide to Volunteer Management*. Philadelphia: Energize, Inc., 1995.
A step-by-step framework for creating a team approach to volunteer management, including mapping the boundaries of jobs and clarifying expectations, finding administrative volunteers and putting them to work in vital ways, and sharing ownership.

Cutshall, S., and Frederick, R. *Treat Em Right: Tasty Ideas for Encouraging Volunteers*. Cincinnati, OH: Standard Publishing Company, 1999.
Creative and inexpensive ways to say "thank you" to volunteers with treats, such as an Andes mint with the message, "You were MINT to be here."

Drucker, P.F. *Managing the Non-Profit Organization: Principles and Practices*. Reprint edition. New York: HarperBusiness, 1992.
Guidelines and expert advice on how to manage nonprofit organizations effectively, including examples and explanations of mission, leadership, resources, marketing, goals, people development, and decisionmaking, as well as interviews with nine experts who address key issues in the nonprofit sector.

Ellis, S.J. *Focus on Volunteering: Ready-To-Print Resources for Volunteer Organizations*. Philadelphia: Energize, Inc., 1999.
Camera-ready pages about volunteering, how to work with volunteers, the history of volunteering, and today's trends, which can be used as training handouts, bulletin board posters, and newsletter inserts.

Ellis, S.J. *The Volunteer Recruitment (and Membership Development) Book*, 3rd ed. Philadelphia: Energize, Inc., 2002.
Suggestions and recommendations on recruitment developed over 20-plus years in the volunteer management field. Includes ways to design the best assignments for volunteers and topics ranging from how an organization's image affects its success in recruitment to where to look for new volunteers.

Graff, L.L. *Beyond Police Checks: The Definitive Employee and Volunteer Screening Guidebook*. Dundas, Canada: Linda Graff and Associates, 1999.
A how-to manual on volunteer and employee screening to help employers understand screening responsibilities. Provides details on how to choose screening methods, as well as practical tips, helpful cautions, and reproducible checklists and tools.

* The views, opinions, and content of these resources are those of the citation and do not necessarily reflect the views, opinions, or policies of SAMHSA or DHHS.

Graff, L.L. *By Definition: Policies for Volunteer Programs*. Philadelphia: Energize, Inc., 1994.
A step-by-step manual on developing policies for volunteer programs. Includes sample policies in more than 70 different topic areas, such as screening, progressive discipline, dismissal, recognition, safe working conditions, and evaluation.

Lee, J.F., and Catagnus, J.M. *What We Learned (the Hard Way) about Supervising Volunteers: An Action Guide for Making Your Job Easier*. Philadelphia: Energize, Inc., 1999.
Advice, wisdom, and experience of more than 85 supervisors of volunteers about what works and what does not. Includes comments from volunteers about what they need from supervisors, excerpts from articles and books by experts, and a self-assessment survey on attitudes and actions needed to supervise well.

Little, H. *Volunteers: How To Get Them, How To Keep Them*. Naperville, IL: Panacea Press, 1999.
Outlines 12 needs of volunteers and how to meet those needs. Includes examples and tools and describes how to compete for volunteers, recruit the best person, ensure that projects are completed on time, prepare new volunteers, manage volunteers, fire volunteers, and keep the best volunteers coming back.

McBee, S. *To Lead Is To Serve: How To Attract Volunteers & Keep Them*. South Fallsburg, NY: Shar McBee, 2002.
Advice and practical ideas, emphasizing the leadership elements of listening, appreciation, and sacrifice; the need for inspiring and informative meetings; the role of fun and creativity; team development; the necessity of "letting go"; the role of expert advice; and the unique problems inherent in reaching goals.

McCurley, S., and Lynch, R. *Volunteer Management: Mobilizing All the Resources of the Community*. Downers Grove, IL: Heritage Arts Publishing, 1996.
A comprehensive guide to managing community-based volunteer programs. Includes chapters on planning and organizing the program and how-to's on volunteer recruitment, motivation, and screening and interviewing.

Pinsoneault, D. *Attracting and Managing Volunteers: A Parish Handbook*. Liguori, MO: Liguori Publications, 2001.
A planning and implementation resource for those who work with parish volunteers. Covers evaluating volunteer resources, assigning volunteers to positions, communicating with and motivating volunteers, managing volunteers, dealing with conflicts, and becoming a more effective leader.

Rusin, J.B. *Volunteers Wanted: A Practical Guide to Finding and Keeping Good Volunteers*. Mobile, AL: Magnolia Mansions Press, 1999.
A guide to finding and keeping good volunteers. Tells how to find volunteers and how to reward them so that they keep coming back.

* The views, opinions, and content of these resources are those of the citation and do not necessarily reflect the views, opinions, or policies of SAMHSA or DHHS.

Tremper, C., and Kostin, G. *No Surprises: Controlling Risks in Volunteer Programs*. Washington, DC: Nonprofit Risk Management Center, 1993.

Discusses risk management for dealing with volunteers in nonprofit organizations. Presents key concepts for developing a strategy to integrate risk management into every aspect of a volunteer program and suggests ways to control risks in 12 areas, such as policies and procedures and transportation.

Vineyard, S., and McCurley, S. *Best Practices for Volunteer Programs*. Darien, IL: Heritage Arts Publishing, 2001.

A collection of hundreds of the best ideas gathered over 20 years of working with effective volunteer programs. Includes practices on needed competencies, recruitment, retention, recognition, conflict, clout, leadership, and change.

Wilson, M. *How To Mobilize Church Volunteers*. Minneapolis, MN: Augsburg Publishing House, 1983.

Points out common problems, establishes management principles, answers questions, and offers a plan to develop a volunteer program. Covers motivating volunteers, avoiding volunteer burnout, energizing "pew sitters," and ways to ask for help.

* The views, opinions, and content of these resources are those of the citation and do not necessarily reflect the views, opinions, or policies of SAMHSA or DHHS.

Other Web-Based Resources[¥]

www.1-800-volunteer.org and www.pointsoflight.org
Points of Light Foundation & Volunteer Center National Network is a nonprofit, nonpartisan organization and network of local volunteer centers dedicated to engaging more people more effectively in volunteer service to help solve serious social problems.

www.avaintl.org
The Association for Volunteer Administration (AVA) is an international professional membership association for individuals working in the field of volunteer resource management.

www.barna.org
Barna Research Group, Ltd. (BRG), a full-service marketing research company since 1984, provides information and analysis regarding cultural trends and the Christian Church.

www.buildingchurchleaders.com (under www.christianitytoday.com)
This Web site sells Christian training resources and provides free articles, newsletters, and a monthly handout. One of its training themes is making the most of church volunteers.

www.charityfocus.org
CharityFocus is a volunteer-run 501(c)(3) nonprofit organization that provides Web-based solutions for nonprofits. It builds Web sites, provides technical assistance, and engages in various projects to benefit nonprofit organizations dedicated to public service.

www.energizeinc.com
A Web site especially for leaders of volunteers, it includes articles, resources, idea exchanges, links to other relevant Web sites, monthly discussions on hot topics, a referral network, collective wisdom in volunteer management, and lists of available jobs and internships in volunteer management.

www.eriskcenter.org
The Risk Management Resource Center provides information to help local governments, nonprofit organizations, and small businesses manage risks effectively. The Center supports anyone whose job involves protecting an organization's people, property, assets, reputation, financial health, and services.

www.fastennetwork.org
Faith And Service Technical Education Network (FASTEN) is a collaborative initiative of the Pew Charitable Trusts that assists faith-based organizations in exploring whether to launch or expand efforts to provide social services. The Web site provides a volunteer toolkit with articles, forms, and resource lists.

[¥] The views, opinions, and content of these Web sites are those of the citation and do not necessarily reflect the views, opinions, or policies of SAMHSA or DHHS.

www.generousgiving.org
The Generous Giving Marketplace is designed to introduce prospective givers and Christian ministries to each other. Ministries can post information about their organizations, submit proposals for Great Commission projects, and increase their exposure. Givers can find opportunities in a geographic region, demographic category, or other area of interest.

www.gosv.state.md.us
This official Web site of the Maryland Governor's Office on Service and Volunteerism offers publications related to establishing volunteer programs, including a best practices guide.

www.ministryaccounting.com
This site offers resources for sale on attaining 501(c)(3) status, compensation, planning and budgeting, leadership, conflict management, and membership databases. It also offers a Church Volunteer Service Booklet, which provides forms for selecting and screening volunteers.

www.nonprofitrisk.org
The Web site for the Nonprofit Risk Management Center is a source of tools, advice, and training to control risks.

www.rapsheets.com
This site offers several methods for criminal records searches, including real-time searches on its public Web site.

www.smartrecovery.org
SMART (Self-Management and Recovery Training) is an alternative to Alcoholics Anonymous and Narcotics Anonymous. SMART offers free face-to-face and online mutual help groups. The Web site includes a library that offers free addiction- and recovery-related resources.

www.tgci.com
The Grantsmanship Center, Inc. (TGCI), is a leading source of grantsmanship training and grant information.

www.volunteerselect.com
This site provides qualified nonprofit organizations with affordable access to the most comprehensive public record and proprietary databases available for screening volunteers.

www.volunteertoday.com
Volunteer Today is an e-newsletter for those who manage the work of volunteers in nonprofit, government, or corporate programs. Its aim is to help individuals organize effective volunteer programs and enhance the profession of volunteer management.

[Y] The views, opinions, and content of these Web sites are those of the citation and do not necessarily reflect the views, opinions, or policies of SAMHSA or DHHS.

DHHS Publication No. (SMA) 05–4005
NCADI Publication No. BKD519
Printed 2005