Volunteer Engagement Program Manual

Prepared for

HILLSBORO DOWNTOWN
PARTNERSHIP

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Executive Summary

Neil Schulman Consulting has created the Volunteer Engagement Program Manual to guide Hillsboro Downtown Partnership in engaging volunteers in a systematic, strategic, and replicable way that supports a young and growing organization.

The Volunteer Engagement Program has several key characteristics, based on input of the Executive Director (ED), Committee Chairs, Board Members, and our assessment of HDP goals, organizational culture, and operating environment:

1. **Embedded Volunteer Model**: The volunteer program is an integral part of HDP's work rather than a freestanding program. Volunteers are engaged primarily to help HDP execute its programming; to the volunteer, it will feel less like being a cog in the organization, or even a "volunteer", and more like simply being engaged in the parts of the HDP that excite them.
2. **Strategic Decision-Making:** This manual creates systematic tools for choosing and prioritizing the most strategically significant volunteer projects rather than reacting to volunteers' interests or the idea of the moment.
3. **Light Administrative Footprint with Some Formalization:** HDP is a nimble and entrepreneurial organization. A light administrative burden will enable HDP to focus on its work rather than bureaucracy. At the same time, HDP should routinize certain processes to prevent re-inventing the wheel, ensure key legal issues are addressed, engage more people in HDPs work, and hedge against key transitions.
4. **Expandable:** This model is expandable as HDP grows, evolves, adds staff, committees, etc. The model will reach its limit when HDP becomes large enough (typically 6+ staff people) where an embedded volunteer structure begins to fray under the weight of different staff people using different approaches.

The Manual is organized as follows:

- **Chapter 1: Volunteer Program Design** describes our findings and program architecture in more detail. It is intended for staff, board, and committee members.
- **Chapter 2: Decision Phase** describes how HDP will surface, vet, and prioritize which volunteer opportunities to pursue, which to bypass, and why. It is intended for staff and committee members.
- **Chapter 3: Recruiting and Screening Phase** describes how HDP will find volunteers to fill positions. It is primarily intended for staff.
- **Chapter 4: Volunteer Management** describes how HDP will manage volunteers to complete projects while also ensuring that volunteers have fulfilling experiences. It is primarily intended for staff.
- **Chapter 5: Volunteer Program Assessment & Course Correction** describes how to assess whether the volunteer program is succeeding and how to adapt as situations change. It is intended for staff, committee chairs, and board.

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Chapter 1: Volunteer Program Design

<u>Narrative</u>

Core Findings and Strategic Issues related to the Volunteer Program

<u>Summary:</u>

As of winter-spring 2017, HDP's volunteer program is a functional part of the high-energy, creative, startup phase of the organization. The Executive Director is a charismatic and creative leader with the ability to attract a core group of people who are creating on-the-ground momentum. Focus has been on moving the work forward quickly in an iterative environment. In this phase of organizational development, the volunteer program is less a "program" and simply how an organization with one staff person gets things done. Key players are largely comfortable with unscripted roles for now. This is not only typical but is *required* of startup organizations to succeed. However, it is not sustainable or geared for growth. Our recommendations will center on how to build a more sustainable structure while retaining as much of the dynamic, unconstrained outward-focused energy as possible.

<u>Key Findings, Early 2017:</u>

1. HDP has attracted a core group of self-starting individuals with a high comfort level for the unscripted "we'll figure it out" startup mentality. This is effective for the moment. However, because more people seek clarity before becoming involved, it restricts the volunteer base and leads to a range of unfilled needs that can accumulate over time. It will also eventually result in the burnout of key people, even if the HDP does not grow.
2. HDP has a clear answer for *why* it engages volunteers: to move on-the-ground work of HDP forward, as opposed to building a broader involvement in a revitalized downtown, or building a base of donors or political supporters. This focus is fairly widely shared across the organization below the board level.
3. There is no formal structure for volunteer management. This has worked well thus far, but poses challenges as the organization grows and involves more people with different needs.
4. The lack of administrative processes, if left unchecked, will lead to missed opportunities (such as knowing who has volunteered and contacting them again) and will constrain the potential of partnering with larger organizations. It may carry liability risk as well.
5. Notably absent is the lack of "middle range" volunteers at the project level between committee members and episodic day-of-event volunteers. These mid-range volunteers would make roughly two to five month project commitments, which could become a pathway to committee volunteers, but there isn't a system in place to recruit and engage

these volunteers consistently.

6. Staff and committee chairs were able to easily define needed volunteer projects, and it is very likely volunteers could be found to complete them. However, the lack of clarity about who defines the project and recruits and manages the volunteers has led to these projects not moving forward.

7. HDP has an "Executive Director will figure it out" mentality typical of emerging organizations with strong leaders. This is most evident in the ability to turn committee's ideas into actionable programming, and in the recruiting of key committee chair, committee member and board positions. When asked how critical work would continue if key volunteers left, the common sentiment was "Saira will find someone or figure it out." This confidence is a testament to current leadership. This reality will become increasingly strained as the organization grows and the ED has more to manage. Future structures must anticipate that the ED's attention will be spread more thin and volunteer leaders will need to be able to do more project and volunteer management, and/or additional staff will be needed.

8. Notably absent was any discussion of fundraising until solicited. This may reflect the current funding structure and may change as HDP grows or EID renewal approaches.

9. One way in which HDP is atypical of startup organizations -- and one that lies beyond the scope of this project -- is the board's distance from HDP's programming, a role typically played by boards in more established organizations. As the organization evolves, the HDP may wish to clarify the best role(s) the board can play and how best to play them.

Strategic Issues for the Volunteer Program:

1. How should authority and responsibility for the core functions for engaging volunteers (readiness, creating volunteer opportunities, recruiting, screening, training, managing and recognizing) be distributed between committees, committee chairs, and the ED? What are the best use of the ED's time and talents, and how can a volunteer-driven system realistically drive core functions as the ED becomes busier? What tools are needed to make this efficient and replicable?

2. The HDP's "volunteer program" is not currently a "program" so much as a standard way that the HDP gets work done. To what extent should it remain this way as the organization evolves? What should priorities be for any additional staffing, and if and when staff is added, how should volunteer management responsibilities shift?

3. What is the right size administrative structure for the volunteer program: tracking, data management, position descriptions, formal training and recognition, etc. that will allow the volunteer program to grow in scale and efficiency while preserving some of the dynamic creativity of the successful startup? What are the critical "back office" functions for a volunteer program in a small organization?

4. As is common of startups with a strong leader, the ability of the ED to "make things happen" and the organization's overall effectiveness are seen as inseparable. If the ED leaves, what will happen to the current momentum and volunteer engagement? How can a volunteer program be designed to survive such a transition?

Volunteer Program Architecture

We recommend a structure in which volunteer engagement is embedded in the operations of the HDP. To the outside, and to some extent internally, it will look less like a program in and of itself and more like a set of practices and organizational culture that integrates volunteer engagement into the way HDP implements programs and develops the organization. The intent is to retain much of the creativity of the current creative culture but formalize it enough to increase volunteer engagement, avoid volunteer fatigue, realize missed opportunities, reduce liability, and allow sustainable growth. This structure adds consistent processes, provides vetting mechanisms for volunteer opportunities, clarifies roles, and identifies core administrative functions.

Key Elements

Embedded in Program Implementation
The volunteer program will function as an integral part of the implementation of HDP's work. Volunteer engagement processes will bend to adjust to program needs more than program needs will bend to engage more volunteers. To the volunteer, it will feel less like being a cog in the organization, or even a "volunteer", and more like simply being engaged in the parts of the HDP that excite them. To HDP staff and committee chairs, it will add some consistency and systemization to the process.

Joint Identification, Shaping, and Vetting of Priorities and Opportunities
HDP has been bypassing volunteer opportunities because they were not shaped into clearly defined roles and/or who would manage them was unclear. This model will formalize how the Executive Director, Committee Chairs, Committee Members and Board Committees work together identify and clarify needs, determine whether they are suitable for volunteers, and whether they are high enough priority and there is sufficient staff bandwidth to manage the project and volunteers. This process will be light and responsive, and will build shared understanding of what is required for good volunteer projects.

Staff Manages Volunteers
The ED (and any future staff) will be responsible for administering the volunteer program (recruitment, screening, orientation, training, management and supervision, recognition, data management) below the committee member level. While the ED's time is obviously limited and in demand, given current staffing this is the most realistic structure for providing the guidance and consistent availability to keep volunteer projects successful. Also, it may be appropriate for some aspects of managing the volunteer program itself to be completed by volunteers.

Light Administrative Footprint
The administrative components will be kept minimal for the foreseeable future. HDP has no significant external requirements for reporting, so tracking will be limited to what can drive improved programming, repeat volunteerism, and reduce volunteer-related liability.

Future Growth
Within the scope of this project, the natural next staff as HDP grows would be a program coordinator or similar position. This person would execute the HDP's programs and take on the embedded volunteer functions, with the exception of high-level recruitment and partnership building. This would free up the ED for higher-level roles as the HDP grows. A National Service member may provide an intermediate approach. This is not to say what the HDP's overall organization-wide priorities for staffing and organizational growth should be. It is our recommendation for the most effective way to magnify program delivery and volunteer engagement.

Key Assets of This Model
Strategic Decision-Making
The ED and Committee Chairs/Committees will jointly identify volunteer positions and determine which ones to pursue. This provides an increased level of strategy and strategic thinking that will 1) use the time dedicated to engaging volunteers with more impact, and 2) build the HDP's ability to create and assess volunteer opportunities over time. This will be critical as the organization grows.

Internal Nimbleness and Low Barriers to Volunteers
The project is designed to be nimble so that HDP can both set priorities and react to changes in projects and programs. We fully anticipate that HDP will often step out of this model when situations demand. The light administrative footprint will pose minimal barriers to volunteers and will allow them to step in quickly while their excitement is high.

Covering Administrative Bases
This model does include a small increase in consistency and administration required for volunteer engagement to continue: accurate volunteer lists, ways to contact volunteers again, consistent volunteer recognition, etc., that are not currently occurring.

Scalable
This model is scalable as the HDP grows. If the HDP increases staffing in the future, it can accommodate increased programming, greater numbers of volunteers and more volunteer projects. This model also puts the processes and responsibilities in place that will be needed as HDP transitions from startup organization to the second phase of organizational development.

Compromises and Risks

Executive Director Bandwidth
This model relies on the ED to manage volunteer projects. The ED is currently the most likely to be able to provide adequate guidance, follow through, and consistency over time. However, the ED's time is limited and their bandwidth will eventually become a pinch point. The ED, as is expected of EDs, is oriented toward creative and
community-facing functions. In the absence of additional staff, the ED will also need to implement the internal administration of the volunteer program mechanisms, even if the

administrative footprint is kept light.

Creation of Volunteer Opportunities

Volunteer program opportunities will be surfaced and shaped by committee chairs, project leaders, and the ED in a process facilitated by the ED. This process requires a quarterly assessment, jointly with the ED and each committee, of what projects are coming up and where volunteers may be able to advance the work. This process is easy to put on paper, but in practice is easily skipped when projects move at a fast pace. This can lead to a cycle of missed volunteer opportunities and deadline-driven work that results in more missed opportunities, eventually leading to the volunteer opportunity development process falling by the wayside.

Vetting of Volunteer Opportunities

Choosing which volunteer opportunities to pursue requires judgment calls. We will provide a vetting tool, criteria, and training on how to use it, but it will still rely on the judgment of the people in the room. Both overly optimistic and overly conservative judgments are likely. The current organizational culture leans toward "yes": this maintains energy and enthusiasm, but may result in some failed projects and volunteers that don't receive adequate support. Overly conservative assessments can stall projects that might succeed. Hedging both these risks will require a combination of dispassionate assessment, learning from past experience, and accepting that some failed projects are an intrinsic part of a growing, high-energy organization.

Future Culture Change

This model is a modified embedded model for volunteer management in which the engagement of volunteerism is held deeply in the organization's work, and not a separate stand-alone structure. Embedded models are inherently vulnerable to culture change in organizations. Because there is no freestanding volunteer structure or "volunteer management staff" that act as the guardians of the organization's culture of volunteerism, leadership change and growth (especially in organizations with technical components, in this case urban design) can weaken the volunteerism culture that makes this model work. This risk is minimal for HDP, but it should be monitored if the organization grows. This is further addressed on page 13.

Decision Phase
ED & Committees
Quarterly

Recruitment Phase
ED

Management Phase
ED

Project Surfacing → Prioritization & Vetting → Table Project

Position Creation → High Level Recruitment / Routine Recruitment → Screening → Cultivation / Table Project

Orientation & Training → Volunteer & Project Management / Problem-solving → Recognition / Communication & Tracking

Core Skills
- Creativity
- Converting ideas to structure
- Strategy

Core Skills
- Community engagement
- Passion
- Prospecting & networking
- People fit

Core Skills
- Project management
- People management
- Data management

Tools
- Surfacing process
- Tool for capturing ideas
- Vetting & Go/No go Framework
- Training for ED & Committee Chairs

Tools
- Position templates
- Recruitment tactics guide
- Streamlined passive recruitment
- Screening process

Tools
- Communication calendar
- Recognition framework
- Early warning signs
- Tracking parameters
- Best practices for event volunteers
- Measures of success

Key Elements of Overall Architecture

This chart provides a brief overview of each phase of the Volunteer Program, what that stage will produce, and the related core competencies and risks. More detail and specific tools are found in the relevant chapters.

Phase	Output	Structure	Core Skills	Pre-Mortem
What happens	*Decision & Actions*	*Who does what and how*	*Characteristics needed for success*	*What could go wrong?*
Decision Phase (Chapter 2)				
Project Surfacing (page 24-27)	Surface and define possible volunteer projects that meet HDP's needs	Projects are generated by ommittees working with ED	Creativity; ability to turn ideas into projects and structure; bringing order from chaos, realistic understanding of projects & volunteers	Requires creative thinking, which can struggle if pace is too fast
Prioritizing and Vetting Volunteer Opportunities (pages 24-30)	Go/No Go decisions on each volunteer position; portfolio of positions to move forward	Short formalized process for deciding if an opportunity is high priority and likely to succeed; interim process for rapid response	Strategic and creative thinking, prioritization, assessment	Calibrating vetting filter requires judgment and constant adjustment: can become either too rigorous or not rigorous enough
Recruiting Phase (Chapter 3)				
Leadership Recruitment (page 34)	Recruiting committee chairs and committee members	Committees, Board and ED recruit via high-touch personal identification and cultivation	Passion for organization, relationship management, networking, ability to inspire, assessment of cultural fit, trait-based recruiting, patience	Works best with a steady pipeline of committee members and chairs: if this falls off, a burnout/desperation cycle can begin.
Routine Recruitment (pages 37-38)	Recruiting project and event volunteers with needed skills	Posting, promoting, and publicizing volunteer opportunities	Passion for organization, methodical approaches, ability to inspire, develop relationships with gatekeepers	Unfilled positions or insufficient skill base for key positions can lead to frustration and failed projects
Screening & Placing (page 39)	Selecting volunteers	Light filter except for leadership/committee roles and key project leaders. Last opportunity to table project.	Assessment of personnel and "fit" to project	Screening can be difficult if project was poorly defined

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Volunteer Management Phase (Chapter 4)				
Orientation to HDP (pages 45-46)	Volunteers familiar with HDP mission and work	Conducted with ED at beginning of project	Ability to inspire	If shortened, volunteers will miss larger vision for why what they do matters
Project Training (page 63)	Project-specific training	ED (or other project leaders) project-specific training; may be at outset or ongoing, in groups or individual as project demands	Ability to provide clear expectations & instruction, skill building	Easily understaffed when staff is crunched, leading to project failure
Volunteer Supervision & Project Management (pages 46-50)	Ensuring success of projects and volunteers	ED manages, occasionally supervised by a committee member with high capacity or another lead volunteer with ED support	Ability to juggle project and volunteer needs, availability, mentoring, supervision, and recognize when additional supervision is needed	Mostly likely failure area. Exacerbated when projects are poorly defined, bandwidth assessments are overly optimistic, or staff is overcommitted
Recognition (pages 51-54)	Volunteers feel valued by HDP	ED responsible for implementing recognition (primarily informal) based on provided framework	Personal knowledge of volunteers & volunteer culture; discipline to implement	Less critical exactly how volunteers are recognized but critical that it occurs, is personal, and fits volunteers
Communication & Tracking (page 59)	Track who has volunteered for what and communicate future opportunities	ED manages information only useful for continued engagement and required reporting: contact information, tasks, interests, etc.	Methodical administrative detail	Tracking failures lead to missed opportunities for further engagement, leadership development, recognition and volunteer retention.
Volunteer Program Assessment and Course Correction (Chapter 5)				
Data reporting for internal purposes (page 69)	Interpreting and reporting on program impacts	ED compiles, interprets and shares with committee	Analytical skill and time to interpret	If insufficient time, data will be warehoused and not used for program guidance Can become a "numbers must go up" mentality.
Program Adjustments (page 71-72)	Making program changes based on key data	ED recommends changes to committees/board	Organizational intelligence and change management	Bandwidth for leadership to assess program changes

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Maintaining a Culture of Volunteerism Within HDP

What is a Culture of Volunteerism?

A culture of volunteerism (also called a volunteer culture) is a set of widely held organizational beliefs that volunteerism has both inherent value and important practical benefit for both volunteers and for the organization. Volunteers are valued for their ethic of engagement and investment in the mission as well as their time, skills, and effort. Staff and board believe that volunteers are intrinsic to short-term and long-term success, and to maintaining the organization's values. In organizations with a strong volunteer culture, even those who do not work with volunteers regularly share these beliefs. Like all organizational cultures, a volunteer culture is established and reinforced at all levels: leadership, middle management, and line staff through a wide variety of habits, behaviors, practices and policies.

In organizations without volunteer cultures, the relationships between staff and volunteers are either one-sided, where the volunteers are sources of labor, or transactional, where volunteers help the organization and receive something that fills their self interest in return (school credit, resume building, etc.) rather than as partners (if unequal ones) in the mission.

HDP currently has a strong volunteer culture. As is typical of small organizations built on the Main Street model, HDP's volunteer engagement is virtually indistinguishable from its programming. Volunteers lead committees and are engaged in much of the organizations' decision-making below the board level. The embedded model of volunteerism provided here maintains that structure and values. In the future, HDP should ensure the volunteer culture remains strong as the organization evolves.

What Makes A Volunteer Culture?

Like all cultures, a volunteer culture exists throughout an organization: its practices, unwritten expectations, decision-making patterns, accountability, and where formal authority and informal influence reside. Volunteer culture is typically most visible in a few areas:

1. ***Values:*** Values are the things organizations choose to do even when it may cost them something to do it. Values are evoked in both formal "values statements" and numerous daily decisions. A values statement is a formal public description of why and how the organization sees volunteers as contributing to the organization and its ability to deliver on its mission. This is currently implied but not overt in HDP's mission language. Whatever the statement, it must be integrated formally and informally into other aspects of HDPS work to keep it from being an empty platitude.
2. ***Planning:*** Volunteer input, in some form, should be integrated into project design, creation of volunteer opportunities, organizational planning, full use of volunteer skill sets, and other attempts to engage volunteers into different parts of the organization. This can take many forms. HDP's current committee structure is a robust incarnation of this. Other examples include volunteer surveys, task forces of volunteers to improve the volunteer experience, treating volunteers as a core stakeholder in the strategic planning process, etc. A strong volunteer culture does *not* mean that volunteers should be involved in every project: many are not volunteer-appropriate and engaging

volunteers in them would be a disservice to both volunteers and the project.

3. ***Staff Expectations:*** New staff are hired with the expectation that working with volunteers is how they will accomplish their job, regardless of their job title or other duties. Those who do not come with skills or experience working with volunteers should receive training. Success working with volunteers is part of job performance reviews.

4. ***Resource Allocation:*** Staff and key volunteers receive training on how to manage volunteers. Resources are allocated to improve the effectiveness and experience of volunteers.

5. ***Long-term View:*** The organization has a long-term view of how volunteers help them achieve their overall mission beyond the next project. Examples of this view include a recognition that this work will always be volunteer-dependent, that volunteers go on to be engaged in the larger field in which the organization is a part, become policy advocates for similar work, or leaders in the organization (board members, etc.) or similar organizations.

6. ***Feedback Loops:*** Organizations with strong volunteer cultures have mechanisms that tell them if the volunteers in their organization are being as successful as possible, having fulfilling experiences, and if their long-term engagement is proceeding as planned. In small organizations, these feedback loops can be informal. They tend to formalize as the organization grows. We recommend a framework for these feedback loops in Chapters 4 and 5.

7. ***Organizational Habits:*** Habits are hard to document but critical to the culture. When a volunteer is in the office, does the ED say a quick word of thanks as they rush between meetings? Do staff and volunteers chat around the coffeepot, or do to they form separate groups? Are volunteers occasionally profiled in newsletters or social media posts, or is this section forgotten when space or time is constrained?

Maintaining Volunteer Culture Through Growth

Volunteer culture can be weakened in an embedded volunteer program, which we are designing for HDP, when the organization grows rapidly. Because there is no "Volunteer Manager" position explicitly charged with guarding the volunteer ethos within the organization, the volunteer culture can weaken when staff become increasingly busy, the pace of work increases, and/or future staff are hired for their technical skills (urban planning, economic development, marketing, etc.) and bring a new levels of advanced skill to this work.

In HDP's three-year horizon, we don't believe this is an immediate threat. Within the time frame of this project, the best ways to maintain the strong volunteer culture are:

1. Continue building strong volunteer-based committees that provide direction and strategy as well as implementation
2. Recruit and retain committee members with volunteer management expertise
3. When a new project or program is created, consider its value to volunteers and the role volunteers could play. This is formalized in the vetting process described in Chapter 2.
4. When/if new staff is hired, set the expectation that they will be working with volunteers and make this part of the hiring criteria and job description.

When is HDP's Volunteer Culture At Risk?

Like all cultures, volunteer culture can undergo subtle and undetected change as an organization grows. Early warning signs that HDPS's volunteer culture is weakening are:

1. Volunteer/staff interaction becomes less frequent, whether formal or informal
2. The volunteer-related parts of program design, input, evaluation, etc., are glossed over, postponed, etc.
3. Volunteers are talked about behind closed doors as "free labor," doing "grunt work," etc.
4. Staff complains that volunteers are more time than they're worth without being willing to figure out how to make volunteer engagement work better, and/or a game of "not it" is played about who works with volunteers. This can occasionally be the case for a specific project without harm, but watch carefully if it becomes a repeated pattern.

Volunteer Culture Maintenance

When a volunteer culture is threatened, the response is dictated by the cause. These typical causes of weakened volunteer cultures that may or may not apply to HDP in the future:

1. <u>Staff Turnover:</u> Changes in personnel can shift the culture away from viewing volunteers as integral to the mission and values of the organization. This can be countered by reasserting the volunteer culture an organizational set of practices and policies rather than the coincidental value of particular staff. Staff turnover is a time to reassert its importance in hiring, position descriptions, professional development, etc.
2. <u>Bandwidth Strain:</u> As program volume grows, staff can become increasingly busy and careen from project to project. This can shortchange the relationship-intensive nature of a volunteer culture.
3. <u>Focus on On-the-Ground Deliverables:</u> Typically driven by a combination of bandwidth strain and funder-driven deliverables (number of projects completed, etc.) this shifts organizational attention to meeting short-term numerical goals rather than organizational culture. Chapter 4 of this guidebook suggests measures of success that can be incorporated into evaluation to work in concert with volunteer culture, rather than at odds with it.
4. <u>Growth</u>: If HDP adds a number of staff in the future (3-5) the volunteer culture may be threatened by growth. Because the embedded volunteer structure integrates the volunteer functions into job descriptions of program and administrative staff, it lacks a single person to hold the culture as the organization grows and becomes more decentralized. At that point, HDP may want to consider other models, such as a hybrid between HR and embedded structures.

Chapter 2: Decision Phase
Creating & Prioritizing Volunteer Opportunities

<u>Narrative</u>

Phase Overview:

The Decision Phase is a systematic way for HDP identify possible volunteer projects, and decide which volunteer opportunities to bypass and why. This process is successful if it:

1. Surfaces a wide range of ways in which volunteers could be engaged in HDPS work
2. Facilitates strategic rather than ad-hoc decision making between staff and committees
3. Increases the ability of staff and committee members over time to identify and evaluate volunteer opportunities.

The process will take place in two ways:

1. Quarterly meetings of each committee with the ED, where each committee reviews its upcoming work, identifies volunteer opportunities and determines which ones are high priority and likely to succeed;
2. Interim decisions when opportunities emerge between committee meetings.

Quarterly Meetings

- Each committee will dedicate a portion of its meeting (45 minutes) each quarter (Jan, April, July, Sept) to identifying and selecting volunteer projects for the upcoming quarter.
- While the committee will prioritize the projects, the ED, with occasional exceptions, will do recruitment and day-to-day volunteer management of volunteers.

<u>The process will be as follows:</u>
(For instructions on how to facilitate this meeting see page 28.)

1. ED reviews the elements needed for a successful volunteer experience (See page 23)
2. The committee reviews upcoming and ongoing work (regardless of volunteer engagement)
3. The group brainstorms ways in which volunteers could be engaged in these projects
4. Each opportunity is filtered through the criteria in #1, eliminating those that do not fit the criteria. This will shorten the list.
5. For the remaining opportunities, the group fills out the attached Volunteer Opportunity Form (page 78).

6. Discussion about 1) which are the most valuable to HDP 2) what the ED's management bandwidth for supporting these projects are, and 3) how many already existing projects are online and/or coming from other committees.
7. The group seeks consensus. If consensus does not occur, the ED, who is most connected to the overall volunteer management demands of HDP, makes the decision.
8. Following the meeting:
    a. Volunteer opportunities that are prioritized are turned into position descriptions (pages 76-78) and a Recruitment Strategy is developed for them. (pages 38-41)
    b. Second-tier priorities re-emerge at the next quarterly meeting
9. At quarterly meetings of committee chairs, the ED reviews the total suite of volunteer projects, so each chair has a sense of the volume of volunteer engagement beyond their committee.

Note:
This process will be slow at first but will get easier over time. Some of the bandwidth will be taken up by volunteer projects already underway; sometimes the discussion will simply be *"Here are the ongoing projects, we can't add anything until these wrap up, unless it's extremely urgent."* As their understanding builds, committee members will develop a better grasp of what makes a successful volunteer project and will suggest fewer unrealistic projects or pet projects that don't fit HDP's overall strategy.

Cross-Committee Awareness

Using the process above, each committee sets its volunteer priorities, which will be executed by the Executive Director through the recruiting, screening, training, management and recognition phases. This means that each committee will be aware of their own volunteer opportunities, but will not have full awareness aware of the entire scope of volunteer priorities across HDP. Only the ED will have this broad view.

To counter this potential silo structure, a standing agenda item at the monthly meeting of Committee Chairs will be a brief review and/or list of all volunteer opportunities currently underway. The purpose of this agenda item is to make Committee Chairs aware of the full scope of HDP's volunteer program and to provide context when creating new opportunities, and to communicate this to their committees. The ED will be a backup for communicating this larger picture.

Roles and Responsibilities

Executive Director:
- Facilitate the quarterly meeting and lead each committee to generate and identify high-priority projects
- Help committee members recognize volunteer opportunities they may not see in projects, especially in the "mid-level" opportunities between episodic day-of, on-the-ground opportunities and long-term committee membership.
- Be the "enforcer of realism": reeling in overly optimistic forecasts of how much time a project will take or how many projects are possible
- Bring the group to a decision if there is no consensus
- Provide context regarding the work of other committees, HDP's overall strategy, and the demands of volunteer engagement priorities of other committees

Committee Chairs:
- Assist ED in facilitating meeting
- Maintain focus between meetings, restrain "shiny object syndrome" and support ED when enforcing realism is necessary

Committee Members:
- Help prioritize volunteer projects: thinking realistically, creatively, and strategically
- Recognize criteria for successful volunteer project, management demands, and other committee needs

HDP's Volunteer Opportunity Background

In crafting volunteer opportunities, HDP should be aware of general trends in volunteerism. Demographic and employment trends can guide the ways that HDP structures its volunteer opportunities to attract the most people with the least effort possible.

Type of Volunteerism	Summary	Volunteer Interests	Demographics	Trend
Episodic	Done-in-a-day (or less) projects, social, events or projects with visible results. Volunteers may lead other episodic volunteers	Quick hit, little intended organizational loyalty, mostly "followers", opportunity to identify leadership potential	Broad based but especially Millennial, families, local and new residents, employee and student groups; weekend/evenings, childcare are factors	Dominant form of volunteerism. Growing
Project	Volunteers take on short-term projects (2-3 months) either as leader or follower; Can be mission or organization-focused	Learning or contributing skills: either learn new skills or use existing skills. Are often selective; can appear like a consultant or intern	Early career and career change resume-builders and retired baby boomers looking to contribute skills. Boomers will not have patience for meetings, bureaucracy, etc. Loyalty is short-term: their lives will usually change	Expected to grow as boomer retirement accelerates; boomer volunteerism requires minimizing bureaucracy and/or "paying dues". Scheduling flexibility required
Long-Term	Committee members, board, etc. Can be mission or organization focused. Some fill office roles, but most are leadership	Vested in the organization and its success; public recognition, work is its own reward	Tend to be retirees, freelancers, etc. Often very loyal unless neglected	Shrinking as older generation ages. As boomer generation ages, it may or may not adopt long-term volunteer patterns

HDP's Niche in the Volunteerism Ecosystem

Based on the nature of HDP's work, we recommend balancing all three approaches, with particular emphasis on mid-term volunteers, to take advantage of unfilled opportunities at HDP.

HDP's positioning lends itself to:

1. Event-driven episodic volunteer opportunities, and mid-range project leaders who can make a longer (two to four month) commitment to helping plan events.
2. The somewhat indirect nature of HDPs work lends itself to a self-selecting group of volunteers who are interested in topics not always in the public eye (downtown revitalization, economic development, planning, nonprofit management) etc. rather than high profile work like the Oregon Food Bank, the Zoo, etc. Therefore, many mid-term volunteer opportunities will come from:
   a. Relevant postgraduate programs and career seekers
   b. Business owners, employees, public service, and retirees with interest in Hillsboro, planning, downtown revitalization, business development, etc.
   c. Engaged local residents with strong ties to downtown Hillsboro (who may slot into both episodic and longer-term positions)
3. HDP's small size and informal culture is an asset for mid-term volunteers, who tend to want specific projects that either 1) build their professional skills quickly, allow them to build a network, and have access to the whole organization, and/or 2) retirees who want to use their skills without a lot of meetings, bureaucracy and procedure.
4. HDP's committee structure relies on engaging long-term volunteers, a shrinking demographic. Growing the mid-level volunteers can be a way of identifying potential long-term volunteers essential to this model. It is also the key to establishing a leadership pipeline. Mid-term volunteers are also often capable of managing episodic volunteers, which can reduce the staff workload.
5. An additional strategy for recruiting talented committee members may be partnerships with larger employers in Hillsboro, who may make it possible for key employees to serve on an HDP committee as part of their job.

Establishing a Volunteer Leadership Pipeline

HDP should strengthen its leadership pipeline. This means using the full suite of volunteer opportunities to identify and groom future committee members, committee chairs, and board members.

This leadership pipeline is not linear. Volunteer attrition occurs at every stage of the pipeline:
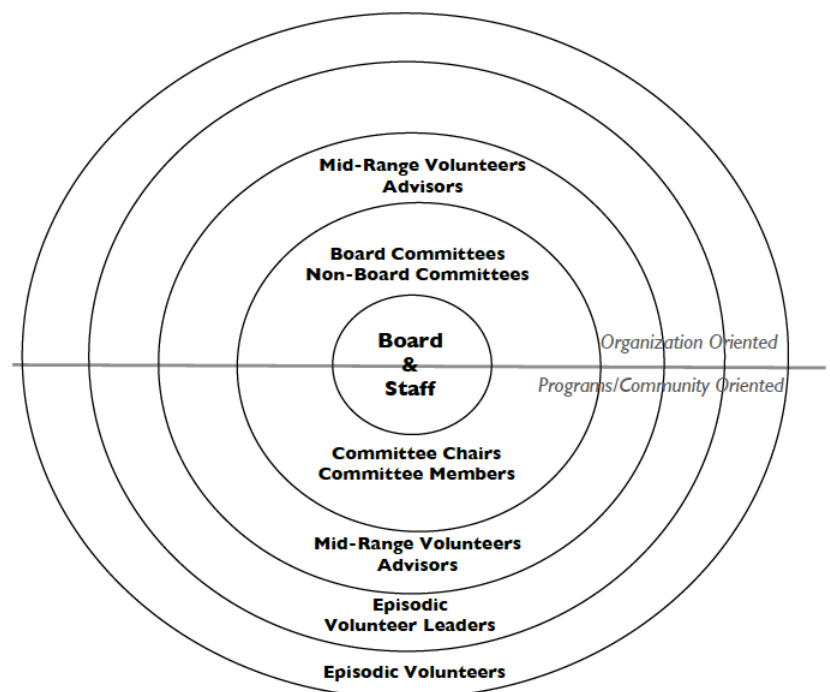
Note: Attrition occurs at each stage due to interest, time, etc.

- Many episodic volunteers are not interested in long-term or repeat commitments
- Many mid-range volunteers seek finite commitments that accommodate travel, careers, and changing interests.
- Program-oriented volunteers may not be interested in planning, governance, fundraising, etc.
- Task skills (planning, event coordination, etc.) do not always translate into catalytic leadership skills needed by committee chairs and board (strategy, vision, persuasion, leading through influence, etc.)

Similarly, volunteers will enter the pipeline multiple points:
- Baby Boomer volunteers or career-focused volunteers looking to build a resume may not want to "pay their dues" as episodic volunteers.
- People new to the community with professional skills may step into leadership quickly.
- At leadership levels: (committee chairs, committee members and board) identifying volunteers should be based more on traits (ability to lead others and turn ideas into plans and plans into action) and passion for the mission than specific skills. Typical exceptions to this rule of thumb are financial management and legal expertise.

Core Skills and Traits for Decision Phase

1. Creativity in seeing volunteer opportunities
   Most organizations have more volunteer opportunities than they recognize. Based on the discovery phase of this project, HDP is no exception. Many tasks done one way can typically be restructured so they can be completed by volunteers. This process requires creativity: envisioning new ways of doing things without constantly reinventing the wheel. The ED and committees will need to think creatively during the quarterly meetings. The ED will often need to prompt the committees with ideas and seek out latent opportunities.
   Example: HDP has been wondering what benefits it can provide to office businesses that don't benefit from retail and food and drink focused promotions. The ED could figure this out … or a volunteer could draft a survey, ask each business owner to complete it, compile the results, and/or invite them to coffee to discuss ideas with the ED.

2. Ability to turn ideas into structure
   Generalized ideas will need to be turned into a structure that a volunteer can complete, with a defined end product, timeline, etc. Volunteer committees that generate ideas are often not the right bodies to operationalize them: this will live with the ED.
   Example: Setting the goals of the survey, creating the timeline, providing the list of office businesses in the service area, setting a time for the ED to review the survey draft, etc.

3. Strategy and (sometimes ruthless) prioritization
   The decision phase is about what volunteer opportunities to pursue, and which not to. This requires knowing HDP's priorities and enforcing them with committees that may have some "shiny object syndrome" for new projects. They may be overly optimistic about what is possible with existing staff time since they are not responsible for day-to-day coordination. Both the ED and the Committee Chairs will need to hold these priorities.
   Example: Telling a committee that an idea is a potentially good one that could yield returns, but that it must wait until more staff time is available after core volunteer functions are addressed.

4. Calibration and adjustment
   Assessing the importance of some volunteer opportunities and how much time they will take to manage will always be judgment calls. Saying "yes" too often will result in some failed projects, frustrated volunteers, and overcommitted staff. Saying "no" too often will leave work undone, reduce the impact of the volunteer program, and disincline committees to bring volunteer opportunities forward. Both errors will inevitably be made from time to time. We encourage HDP to continue to say "yes" when in doubt for the near future: it fits the organization's high-energy entrepreneurial culture. As time goes on, HDP will learn to calibrate the filter for taking on new projects.
   Example: Recognizing that in an attempt to keep staff time protected, the volunteer opportunities have shrunk and volunteer enthusiasm is reduced, and suggesting committee be slightly more aggressive.

5. <u>Facilitation</u>
The ED will facilitate the quarterly meetings where volunteer opportunities are generated and prioritized. This requires group process skills to reveal opportunities, seek engagement and understanding, and reach a decision that may leave some disappointed. These processes typically feel foreign for a short time until the committee develops a muscle memory for the process.
Example: Reminding committee members about the process that occurs every quarter, how it works, what was decided last time, and leading the meeting with skill and confidence.

6. <u>Building shared understanding of workload</u>
The amount of time required to manage volunteers is often invisible to those who don't do it. The ED will have to educate committee members about the staff time and infrastructure needed to support volunteers, and where it is time effective and where it is not. This will help committees and Board resist the urge to take on more projects than possible. Building an understanding of staff resources needed to make the volunteer program possible (or for it to grow) is also groundwork for any future organizational support for expanding the volunteer program.
Example: "Those are all great ideas and we could find volunteers to work on them. But we also need to keep in mind that there are four committees, and each has volunteer projects for me to manage. I think realistically we can't tackle more than the top three."

<u>Processes, Practices and Templates</u>

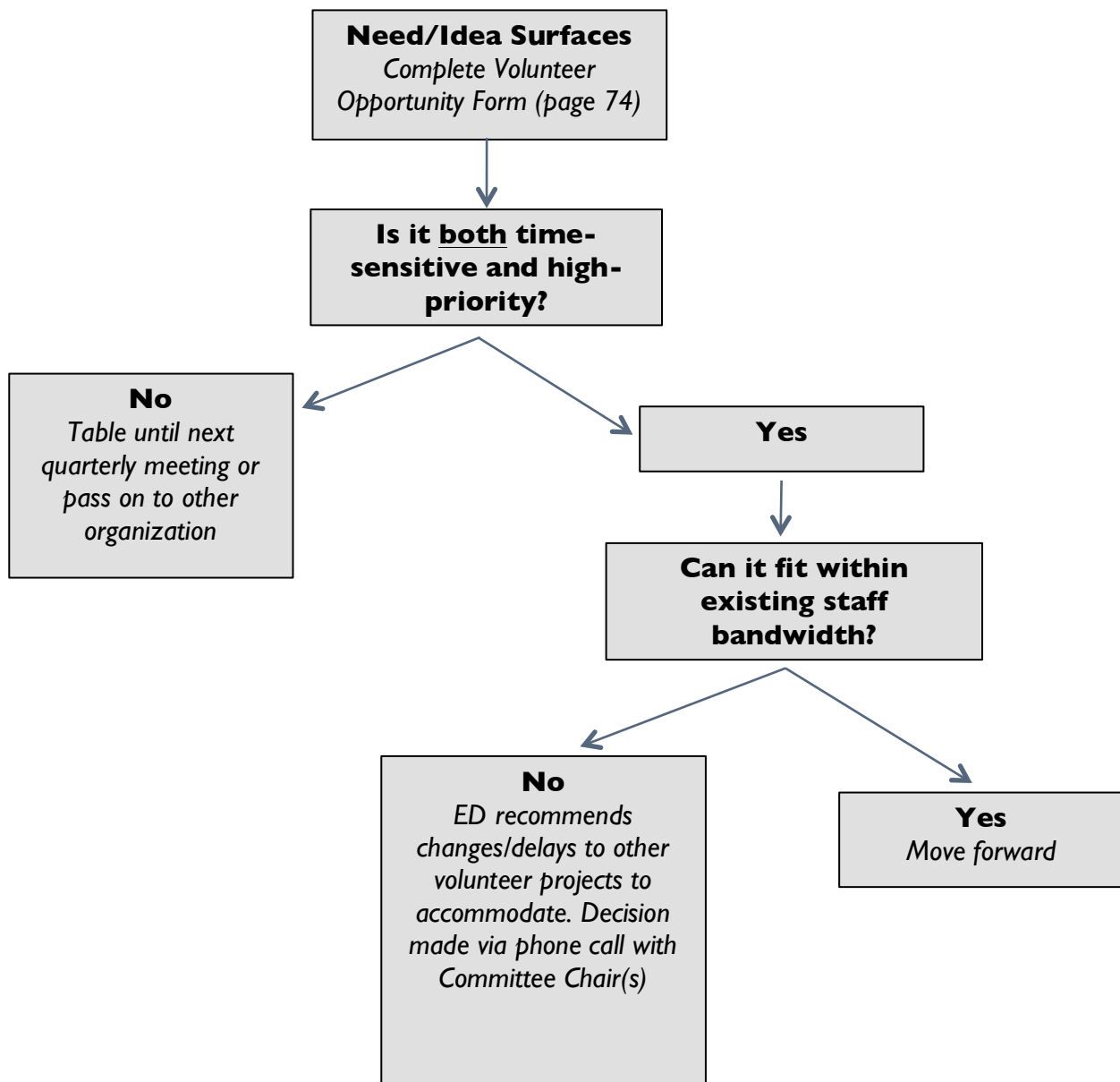## Criteria for Good Volunteer Projects

1. A clearly defined product, scope, our outcome
   Before recruiting a volunteer, HDP should be clear what the project is, and its budget and timeline
   Examples: Take photographic inventory of downtown business storefronts for downtown storefront improvement needs assessment, serve on a committee that guides and implements HDP's marketing and communications, etc. Before recruiting a volunteer, HDP should be clear what the project is, and its budget and timeline.

2. A clear understanding of how HDP will use this product and why it is important
   Example: inventory will help target properties for storefront improvement funds and will be part of HDP's campaign for increased funding for storefront improvement.

3. A clear start date and end date. Ongoing needs should be broken up into finite, realistic commitments.
   Example: Approximately 1-2 months, depending on volunteer availability. Begins May 2017, must be complete by 9/30.

4. Number of hours' commitment and when/how they can volunteer
   Example: Approximately 4/hrs. per week, flexible schedule, can work independently

5. A single person who will train, mentor, and supervise the volunteer(s)
   Example: Supervised by Executive Director

6. A list of abilities the volunteer needs and what training will be provided
   Example: Basic digital photography and computer skills, interest in downtown revitalization, reliability and ability to work independently.

7. A realistic likelihood of recruiting someone with these skills
   Example: Confidence that HDP will find someone with these skills in existing volunteer base or people with a photography and/or downtown interest.

8. A description what the volunteer will get from the experience
   Example: Exposure to storefront revitalization issues, opportunity to connect with downtown business owners, use photography skills for a good cause; exposure to other areas of HDP's work.

Opportunistic Volunteer Process

The Decision Phase uses a quarterly meeting of each committee to identify volunteer projects in a strategic way. This is designed to make best use of HDP's limited staff time and allow staff and committees to create and follow a plan.

However, opportunities will arise between meetings. This process will guide HDP in deciding which ones are worth responding to quickly and which are not.

The flow chart below provides a decision-making framework. A quick decision will often be needed. This process should be light and quick. HDP's responsive, entrepreneurial culture and small size will be an asset.

Need/Idea Surfaces
Complete Volunteer Opportunity Form (page 74)

Is it both time-sensitive and high-priority?

No
Table until next quarterly meeting or pass on to other organization

Yes

Can it fit within existing staff bandwidth?

No
ED recommends changes/delays to other volunteer projects to accommodate. Decision made via phone call with Committee Chair(s)

Yes
Move forward

Quarterly Volunteer Project Selection Meeting Agenda

Time	Topic	Outcome	Lead
10 min	Overview	Committee familiar with process & volunteer project criteria	Executive Director
15 min	Identifying Possible Projects	Possible volunteer projects identified	Executive Director
15 min	Vetting & Choosing Volunteer Projects	Projects chosen for next quarter	Executive Director
5 min	Conclusion and Next Steps	Projects ready for creating position description	Executive Director/ Committee Members

Quarterly Volunteer Project Selection Meeting
Facilitator's Guide

Meeting Objectives:
1. Surface possible volunteer projects that will support the committee's work in the next quarter
2. Identify those that fit HDP priorities and criteria of a good volunteer project
3. Select projects to move forward

Time: 45 minutes

Setting: Meeting space, conference-style or similar

Materials:
- Two flip charts/dry erase boards and markers
- Tape
- Criteria for Good Volunteer Projects (page 24)
- Volunteer Opportunity Form (page 74)
- Agenda written on flip chart

Ground Rules:
- Everyone participates
- Everyone brings both their open creative thinking and their focused decision-making abilities
- Mutual respect

Opening: (ED, 10 min)
1. Purpose of meeting: to generate and then select good volunteer projects. Two reminders:
   a. Volunteers are essential to HDP's work with only one staff member
   b. That staff member (ED) is also responsible for recruitment and management, so a combination of creativity and realism are required
2. Review ground rules
3. The committees' upcoming and ongoing projects are listed on one flip chart, regardless of volunteer involvement (holiday promotion, music in the park, planning for spring event, fundraising, etc.). This sheet is taped to the wall.

Generating Volunteer Projects (15 min)
4. ED reviews what makes a good project (page 24) and posts the list somewhere visible.
5. Committee members are asked to think of all the ways that volunteers could be involved in the committee's projects. ED gives two to three verbal examples. They are given one to two minutes to think and jot down ideas quietly.
6. The group brainstorms opportunities, which the ED lists on a flip chart, injecting additional ideas if the group struggles. Brainstorming rules apply: no evaluation of ideas, everyone contributes. Facilitator acts to balance group participation. If the group is large

(more than eight) they can do this activity in small groups and present their list to the larger group.

<u>Prioritization (ED, 15 min)</u>
7. Projects that clearly do not fit the criteria are eliminated quickly. This shortens the list.
8. For the remaining opportunities, ED facilitates discussion about 1) which are the most valuable to HDP, 2) the ED's management bandwidth for supporting these projects.
9. The ED notes any gaps (i.e., all volunteer projects are focused on one event, all are long-term opportunities, over- or under-ambitious thinking)
10. The group seeks consensus on a set of volunteer projects to move forward. If consensus does not occur, the ED, who is most connected to the overall volunteer management demands of HDP, makes the decision.

<u>Conclusion (ED, 5min)</u>
11. For volunteer projects that move forward, the person who knows the project best fills out the Volunteer Opportunity Form (page 84) and gives it to the ED. These collected forms will be turned into Position Descriptions (pages 76-78).
12. The ED fills out the Bypassed Volunteer Opportunity Form (page 75) for projects that have value but aren't moving forward at this time. Those noted will discussed at the next quarterly meeting. This will also be used in reporting (pages 69-70).

Facilitator Tips:

The following challenges are typical of this process. Here is how the facilitator can keep the process on track:

- <u>Group Struggles to Identify Volunteer Opportunities:</u>
  Provide many varied examples, ask probing questions to get to actual tasks needed ("*If we have a lot of work to before the holiday promotion, what are the tasks—lay out document, distribute to businesses, post in social media, etc.*") that can help them subdivide activities into specific tasks volunteers can complete.

- <u>Group Only Identifies One Type of Volunteer Opportunity:</u>
  Provide counter-prompts and examples *"Ok we have a lot of day-of-event ideas. What can you use help with in the month before? Can someone do regular posting on social media in the two weeks before? Secure food donations?"*

- <u>Group Ignores Criteria and is Overly Ambitious About What's Possible</u>
  Enforce the criteria as a filter. *"Ok, we've gotten away from what makes a good volunteer project. How many of these really meet these? Do any lack a clearly defined product? I think some might."*

- <u>Group Struggles to Eliminate Anything</u>
  Use Voting. *"Ok, we can't do all of this, even if they're all great projects. I can only manage the top three. Everyone put a check mark by their top three choices."*

- <u>Group Finds Flaws in Everything</u>
  If the projects actually do fit the criteria and are valuable, ask why. *"Ok, we have six projects here, and they seem to fit what we need. What's the hesitation in moving forward?"* If they don't actually fit criteria or concerns about management capacity is valid, revisit the next quarter.

- <u>Group Can't Come to Agreement due to Pet Project/Turf Issues</u>
  Focus the group on HDP's overall needs and enforce this with the group. *"I hear that you want to spread the volunteer efforts around, but right now our priority has to be Farm to Table until that event's concluded. After that we'll circle back to the other ideas so we'll bring them back the next quarter."*

Troubleshooting

Because the decision phase is both the most non-linear and the most strategic part of HDP's volunteer program, it is essential to retain a wide-angle view that allows HDP's ED and committee chairs to continually adjust based on two continua:

1. Responsive to ongoing needs vs. strategically following a plan to fruition
2. Fast-paced, timeline-driven decision making vs. helping volunteer committee chairs and committees understand and feel invested in the volunteer program

These will always remain judgment calls and HDP should trust the professional judgment of its leadership and staff to make these adjustments. The following are a series of "indicator lights" that may indicate something is out of sync, along with how to respond.

Indicator	Likely Cause(s)	Possible Responses	If Left Unattended
Quarterly meetings fail to surface many volunteer opportunities	• Committees have poor understanding of ways to engage volunteers • Process is rushed	• Preview and give committees time to think in advance of meeting • Provide examples and additional training • Dedicate more time to process	Volunteer opportunity creation will eventually be delegated entirely to staff. This will require more staff time and reduce buy-in to adding resources to the volunteer program
Quarterly Meetings get skipped	• Time pressure • Lack of committee participation	• If time pressure, add more time to meetings, make some decisions via email, etc. • Reassess committee makeup, function, and operations	See above
Committees pushes projects with little or overly optimistic assessment of staff management limits	• Committee is divorced from management demands • Committee lacks strategic view and pursues "pet projects"	• Tighten filter for which volunteer projects move forward. Focus on value to HDP and management demands • Review HDP overall strategy	Will result in too many projects that may be done poorly, frustrated volunteers, and strained staff.
Some committees suggest volunteer opportunities first, filling HDP's capacity before others engage	• Some committees understand volunteerism better • Some committees meet earlier/more regularly	• More facilitation and mentoring with committees that struggle • ED holds space in volunteer portfolio for committees that meet later	Some committees will disengage from the volunteer process, possibly creating a split in committees' volunteer engagement
Projects are suggested but few move forward	• Caution about staff time • Committee does not believe that volunteers can achieve tasks	• Loosen filter for which volunteer projects move forward • Make committee aware of past successes • Document bypassed opportunities (see Chapter 5)	HDP will miss opportunities to get work done. If this continues, skeptics may feel that volunteers are not essential to HDP's work.

Priorities set in quarterly meetings are overtaken by changes between meetings	• Pace of work is too fast for quarterly priority-setting • ED not adhering to quarterly priorities	• ED brings recommended changes to priorities to committee's meeting on a monthly basis • ED sticks to priorities	Committees will abandon process if they feel it is too slow or if priorities they set are not followed
Committees feel like they are "competing" for volunteer opportunities with other committees	• Committees don't know what volunteer projects are happening in other committees • General climate of internal competition	• ED renews focus in chairs meeting on sharing entire HDP volunteer project portfolio • Greater communication between committees	Create a siloed environment that weakens overall strategy

Last but not least, HDP should accept a certain number of 1) bypassed opportunities that, in retrospect, could have been pursued, and 2) opportunities that in hindsight strained the management capacity. These are part and parcel of an innovative organization in a dynamic phase of its evolution.
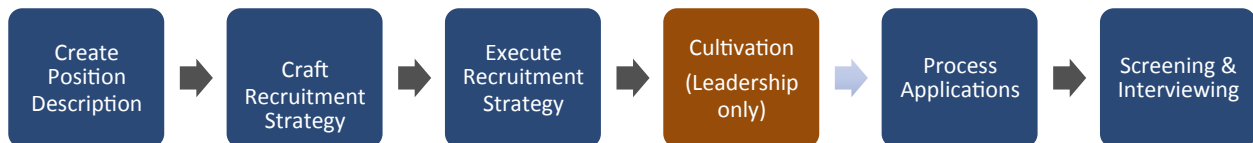
Chapter 3: Recruiting & Screening Phase

<u>Narrative</u>

Phase Overview

Recruiting and Screening is the primary outward-facing phase of the volunteer process. It begins when HDP opts to pursue a volunteer opportunity, and ends when a volunteer is placed within the organization. It relies heavily on networking, community outreach, posting and communication positions, and screening candidates. It also offers the last best opportunity to pull the "emergency brake", not filling a position if suitable candidates are not found. The ED is the primary driver of this phase, with assistance from committee chairs and members, board members and volunteer who can assist in the reruiting process. This phase is followed by the Volunteer Management Phase (Chapter 4.)

The Recruitment and Screening Phase involves five steps, and a sixth (Cultivation) that only applies to leadership-level volunteers, such as committee chairs and members.

| Create Position Description | → | Craft Recruitment Strategy | → | Execute Recruitment Strategy | → | Cultivation (Leadership only) | → | Process Applications | → | Screening & Interviewing |

Volunteer recruitment requires two different competencies. The first is the interpersonal skills to develop and maintain relationships with both potential volunteers and with gatekeepers who have access to pools of volunteers, and to find ways to meet the needs of both HDP and the volunteer. The second is the administrative skills and methodical approach to manage a series of timelines, communication channels and processes. Because these skills often live within multiple individuals, the ED may want to engage volunteers in helping administer the procedural part of the recruitment process: posting position descriptions, receiving and communicating with volunteers, scheduling interviews if needed, etc.

While the ED leads recruitment, the support of committee chairs, committee members, and board members is essential. Their role is often to access their networks, especially to recruit leadership volunteers (page 34) and navigating the gatekeepers in larger partners that often have access to volunteers who are higher in number but often highly sought after (page 35-36).

Because HDP relies on active committees and has minimal staff, volunteers will often be placed in the role of coordinating other volunteers. The volunteer who will be supervising the volunteer(s) being recruited should have input to the position description. If it all possible, that volunteer should participate in interviews, and certainly should for high-skill, high-sensitivity, or medium-term positions.

Roles in the Volunteer Recruitment Process

Step	Description	Executive Director	Committee Chair & Members	Office Volunteers
Create Position Description	Convert Volunteer Opportunity Form (page 74) from quarterly meeting into volunteer-facing Position Description using templates (pages 76-78)	Creates position description(s); translates into postings based on various website interfaces	Reviews position description (sometimes)	
Craft Recruitment Strategy	Select main recruiting instruments (pages 37-38) and create timeline (page 41)	Selects recruitment strategy based on position type		
Execute Recruitment Strategy	Implement timeline	• Directs recruitment (posting, networking, generating candidates, etc.) • Develops promotional materials • Evaluates when strategy is working, adjusts for too few/many applicants	Taps network to support recruitment, esp. for leadership	• Taps networks for prospects • Posts and reposts volunteer position • Email blasts, social media, etc. at direction of ED
Process Applications	Receive applications (page 79), communicate next steps with volunteers			• Responds to inquiries • Communicate next steps to applicant • Enter in volunteer tracking
Screening & Interviewing	Review applications, interview/meet where appropriate (leadership, long-term, high-stakes projects, managers of other volunteers) *Not necessary for many episodic volunteers*	• Conducts interview/reference checks as needed. • Decides which volunteers to place. • Communicates with and mentors position supervisor(s). • Decides when/if to halt a project – if volunteer pool is inadequate	• Participates in interview/selection for key positions • Supports ED selection decisions	• Processes applications • Schedules interviews • Send event details and reminders to volunteers
Cultivation* (Leadership only)	Nurture relationships before volunteers will take on leadership roles	• Identifies prospects • Facilitates prospecting with committee Chairs, members & Board • Networks to identify possible candidates • Manages Board/Committee cultivation activities • Maintains and deepens relationships	• Identify prospects • Tap network • Engages in cultivation	

*Cultivation of Organizational Leaders

Recruiting key volunteer organizational leaders—board members, committee chairs, and committee members—has a different character than recruiting for routine positions. While they have many aspects in common (position description, clear expectation, etc.), there are some critical differences:

- The time, duration, and level of responsibility are great enough that they are more difficult to recruit for than other volunteers.
- They must have a deeper commitment to the work and a greater level of trust between their fellow board or committee members due to their critical role, fiduciary responsibility, access to inside information, etc. than is expected of routine volunteers
- Identifying and cultivating future leaders is a continuous process.

As a result, there are some differences in recruiting strategies:

- Personal and Professional Networks
  Few reliable volunteers at the leadership level are found via mass communication. Most are identified through the personal and professional networks of staff, board, committees, and their trusted professional colleagues. Developing a list of prospects requires the committees and leadership to actively tap into their networks to generate a list of suggested names. Willingness to tap these networks is generally a prerequisite for board service.

- Trait-Based Recruitment
  The higher the leadership level, the more important it is to recruit for general *traits* (commitment, professionalism, problem-solving ability, persuasiveness, ability to work well with others, etc.) than for specific *skills* (marketing, events, etc.). This is because leaders at this level will see many projects of different types and must have the ability to help the HDP thrive as it evolves rather than be good at one specific task. Exceptions are financial and legal expertise.

- Vetting Prior to Cultivation
  Because there is a cultivation period before the person agrees, and because trust and ability to work together are so critical, the names of prospects should be vetted before they are approached or cultivated (confidential and within HDP only). This prevents wasting time cultivating someone who will not be a good fit.

- Cultivation
  Most prospects will need to be cultivated before they will be willing to join a committee or board or accept a chair position, due to the time demands. This is a gradual active process that takes months: meeting with them, inviting them to events, following up, asking if they have any questions, inviting them to sit on a meeting, etc. A healthy organization will have a list of prospects, all being gradually cultivated by different people within the organization's leadership.

Partnerships

Formal organizational partnerships are an efficient way to reach resources and volunteers at a scale greater than recruiting individuals. Corporate, faith-based, civic, schools and service organizations have the ability to deploy hundreds or thousands of potential volunteers, if they can be convinced of a good fit. These partnerships, in addition to a good volunteer project, require organizational as well as human relationships, and a mutually beneficial project that meets the needs and cultures of both HDP and the partner organizations.

What partners may need from HDP;
- A project that meets the partner's culture, philosophy, employee morale and team building, public recognition, etc.
- A well-organized project that can accommodate their group without hiccups
- Project details in a succinct, publishable form
- Clear goals and expectations of all parties involved
- Who or what and how recipients benefit
- Report with a list of volunteers and statistics regarding their service
- Recognition (for both volunteers and for the partner organization)
- Debrief from the event and ways to improve it for both parties
- Public recognition

Like all organizational partnerships, these take time to cultivate: finding the right person in the organization, seeking out the mutual benefit, identifying and overcoming barriers, building trust, and navigating each partner's internal calendar, approval processes, etc. before a project moves forward.

Corporate Partnerships
Corporations are often attractive partners due to their large employee base and financial resources, as well as in-kind expertise in area ranging from operating heavy equipment to graphic design. Corporate partnerships can raise money through "volunteer match," sponsorship and/or grant programs, and bring credibility and visibility their partners. Strong corporate partnerships can also bring commitment to provide volunteer experts to fill high-level and board positions. We believe that HDP stands to gain efficient access to large groups of people, including retirees, interested in events and other episodic projects and that this should rank high amongst HDP's long-term recruitment strategies. HDP should invest time in research to determine similar missions and interests identifying the program contacts and learn how to bridge any gaps between HDP and their corporate culture.

Corporate partnerships typically develop in three stages;
1. Engagement of episodic volunteers in one or a few projects, leading to;
2. Engagement of long-term volunteers, and professional in-kind services, leading to;
3. Full company support: long-term commitment, pro-bono volunteers and financial/in-kind support

Corporations are different from other types of partners, although some will be shared by government agencies:

- **Heavily Invested in Brand/Reputation:**
  Corporate partners will often seek to maximize the public perception and/or marketing benefit of their involvement. They may seek positive news coverage, logo or web impressions, the opportunity to present their product or role in the community, etc. If financial support of community projects is managed through their marketing budget, partners will weigh the cost/benefit of involvement over other marketing avenues.
- **Intensive Relationship Management**
  Corporations may request changes from how HDP usually manages volunteer projects to accommodate their needs. This will require HDP to be more flexible than usual. The more high profile the corporation, the more it is likely to be sought after by a variety of nonprofits, and the more they may expect from HDP as a result.
- **Long Timelines**
  Large entities of all kinds have long decision-making processes and multiple levels of approval. The larger the corporation, the more steps and time in the process.

Volunteers Supervising Volunteers

Committee chairs, committee members, selected episodic volunteers, and mid-term and long-term volunteers will likely lead other volunteers to coordinate one-day activities and events. Both volunteer leads and volunteer followers need support to work together successfully. The ED will need to be able to identify the volunteers that are likely to succeed in managing other volunteers, and help them succeed. Managing volunteers requires equal parts natural aptitude, training and mentoring, patience, and a clear understanding of their project.

HDP can maximize success in recruiting for a volunteer position that will supervise other volunteers by:
- Making clear in the position description that the main role is managing/leading other volunteers, not doing the project themselves
- Seek populations that already include leadership ability: scout leaders, sports coaches, managers, teachers, etc.
- Seeking people expressly wanting to develop their leadership skills, and calling this out in the position description and postings
- Not assuming that competence in doing the task automatically translates into ability to lead others
- Promising training in managing other volunteers, but not more than you can actually deliver.

HDP should also set clear expectations with volunteers who will be supervised by other volunteers in the recruiting process. These will likely include making them aware that:
- Volunteer leads may not be as available as staff, especially during work hours

- Volunteer supervisors will sometimes how to consult with staff, creating a slower response time
- Volunteers will complete projects with minimum supervisory input, and won't have as much direct access to HDP staff.
- HDP is committed to treating volunteers with the same level of professionalism as if they were supervised by professional staff

Core Skills and Traits for Recruiting Phase

1. Ability to be Methodical
   Recruiting the right volunteers at the right time is dependent on adhering to outreach and promotion schedules, posting and re-posting positions regularly, processing applications responding to applicants quickly. The maxim "plan your work and work your plan" applies here more than any other in the volunteer management process.

2. Inspiring Others
   The possible opposite of being methodical, the other key skill to recruitment is the ability to be persuasive about the mission of HDP and why people should be part of it. The ability to communicate this vision in person, in writing, over the phone, and online, communicate vision and strategy, infuse others with enthusiasm, interest and ultimately dedication is key to building relationships at all levels; individual, organizational, committed volunteers and committee and board members.

3. Reading People, Situations and Motivation
   Recruitment requires continual assessment: whether a volunteer is the right fit for a position, assessing what project will be most rewarding for partner organization constituents, and what motivates a particular leadership prospect. These are soft skills gained through repeated "right-result" placements as well as trial and error. Over time the ED will develop a keen instinct for placing the right people in the right position.

4. Ability to Work Across Cultures
   HDP's volunteer program will be an intersection of diverse cultures; long-time residents and newcomers, political viewpoints, race and ethnicity, ages, worldviews and different organizational cultures. The ability to listen and find common ground is critical in working with volunteers.

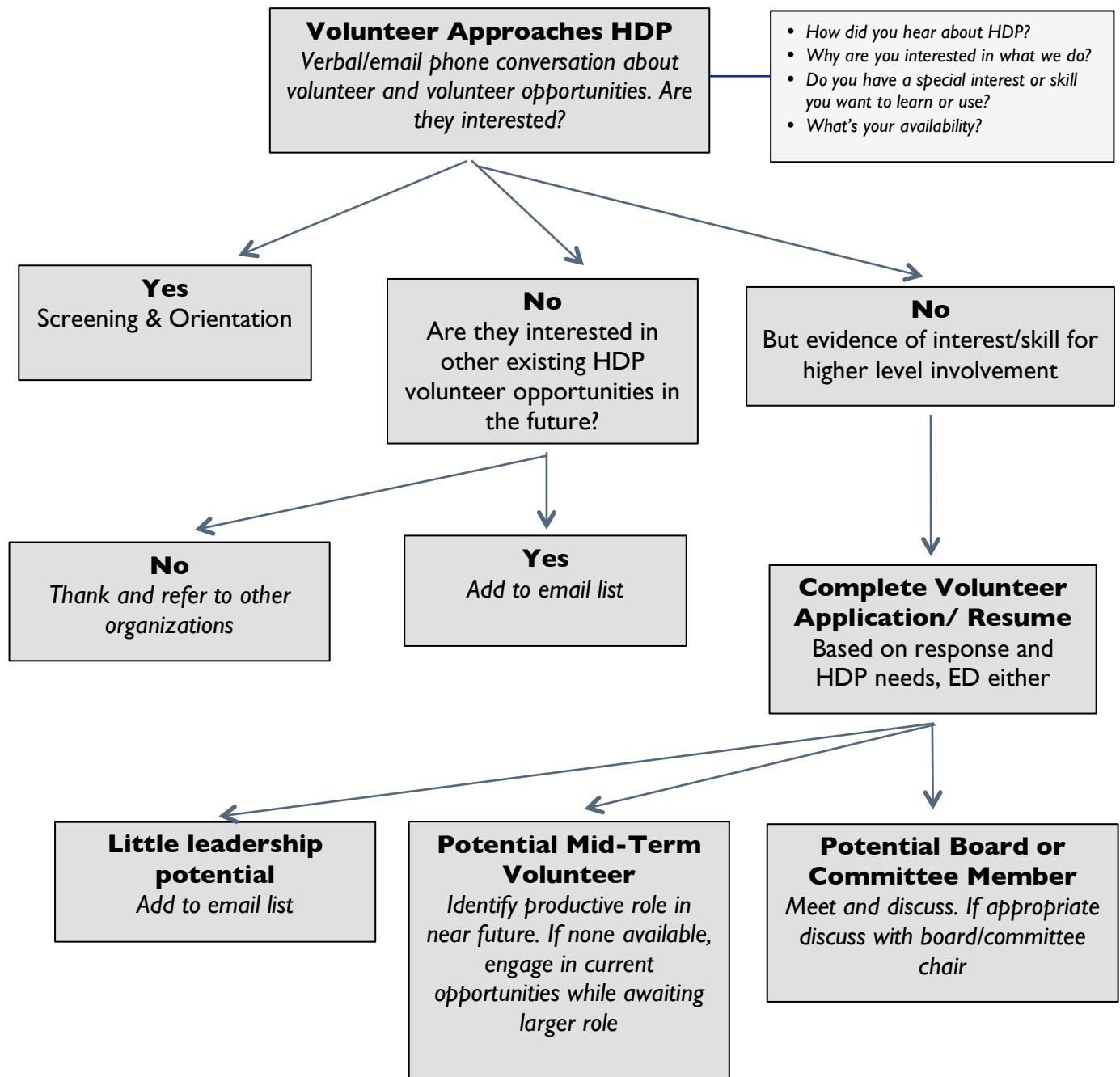# Processes, Practices and Templates

Recruitment Methods

There are a wide range of recruitment tactics and tools that are used in recruitment. They will vary with the position and the likely volunteer base, and they will range from very broad and light-touch (website posting) to specialized (seeking engineering skills through Intel alumni

groups or people with customer service skills through Starbucks' baristas) to very focused, and high-maintenance (individual asks). HDP will want to develop its own organization-specific library of partnerships, recruitment instruments and posting locations as it develops. We have provided here a general set of guidelines: which instruments for recruiting tend to work best for which times of positions.

Recruitment Tactics Chart

Instrument	Episodic		Medium-Term		Leadership
	Broad	Targeted	Broad	Targeted	Targeted
Owned by HDP					
HDP website	X	X	X	X	
HDP mass email, newsletter, Facebook, Twitter	X		X		
Stakeholders (long term volunteers/partners)	X	X	X	X	X
Events/Activities	X	X			
Committee member & board contacts				X	X
External, Gatekept					
Other organizations' websites & listserves (internal/external)	X	X	X	X	
Social media of partners/other orgs.	X	X		X	
Schools & Colleges	X		X	X	
Faith-based organizations	X				
Government agency employees	X				X
Corporate/Business employees	X			X	X
Professional/Trade orgs		X		X	
Community service orgs	X	X			
National service orgs (AmeriCorps, VISTA, etc.)	X	X		X	
Special interest groups (garden clubs, etc.)		X		X	X
Retirement groups	X	X		X	X

Screening Flowchart

Volunteer Approaches HDP
Verbal/email phone conversation about volunteer and volunteer opportunities. Are they interested?

- *How did you hear about HDP?*
- *Why are you interested in what we do?*
- *Do you have a special interest or skill you want to learn or use?*
- *What's your availability?*

Yes
Screening & Orientation

No
Are they interested in other existing HDP volunteer opportunities in the future?

No
But evidence of interest/skill for higher level involvement

No
Thank and refer to other organizations

Yes
Add to email list

Complete Volunteer Application/ Resume
Based on response and HDP needs, ED either

Little leadership potential
Add to email list

Potential Mid-Term Volunteer
Identify productive role in near future. If none available, engage in current opportunities while awaiting larger role

Potential Board or Committee Member
Meet and discuss. If appropriate discuss with board/committee chair

List of Lists

Keeping a systematic list of where to post volunteer position is a key aspect of building a methodical system that can operate efficiently, and can be handed to a volunteer who is posting positions. This document is a template HDP can use to flesh out its list specific to Hillsboro, HDP's mission, and volunteer projects. Particularly important is the fields in this spreadsheet. This list will be made available in Excel and only a small section is shown here for understanding. The fields will give insight into how to navigate a particular institutions (i.e., the type of position most likely to be able to engage volunteers at a school, business, etc.). Building the list may be a good volunter project.

This list generally falls into three categories:
- Broad volunteer postings: entities like Hands on Portland or JustServe that exist specifically to engage volunteers
- General types of community organizations that exist in every community (schools, churches, etc.) but are different in each community: HDP will need to find the contacts at each one in Hillsboro
- Companies, clubs, agencies, and community groups that exist only in Hillsboro

OUTREACH	Organization	URL	Department	Title	First	Last	Email	Address	Cell	Office	Club/Group	Matching Funds	Distributes to	Notes
Social Media Groups/Discussion														
Schools & Colleges														
	Hillsboro High Schools		Liberty	Principal									3,000	
			Liberty	College/Career Counselor										
			Admin	Key Club Advisor							Key Club			Service organization involved highly-motivated students, typically for one-day projects
	Pacific University													
	Portland Community College		To submit a volunteer opportunity to their newsletter visit: http://www.pcc.edu/resources/communi											
	Portland State University (PSU)		Student Engagement Center	Coordinator of the Student Engagement Center										Most useful for reaching interns
Faith-based														
	Church of latter-day Saints of Jesus Christ	justserve.org	Hillsboro Stake	Community Service Specialist										Exceptionally organized volunteer teams with strong project lead skills.
	Church of latter-day Saints of Jesus Christ		Metro Region Missionaries										300 members	Great one-day event volunteers. "Elders and Sisters", college-age, outgoing, fun-loving, community-spirited. To engage develop relationship with Missionaries Bishop. Volunteers must remain with partner during activities. No other restrictions. All communication through Bishop.

Recruitment Timelines

Recruitment lead times will vary with event complexity and the needs of individual positions. These are starting points for HDP's planning. Eventually lead time may be reduced with regularity. Plan further ahead when there is a staff or volunteer leadership change, either at HDP or at a key partner who you rely on for recruiting help.

EPISODIC EVENTS		
Number of Volunteers Needed	ROUTINE (few specific skills needed)	COMPLEX (specialized or leadership skills needed)
1-20	4-6 weeks	6-8 weeks
21-50-	6-8	8-12 weeks
51-100	8-12	12-16 weeks
*101+	16-20	20+ weeks
INDIVIDUAL POSITIONS		
1-2	4-6 weeks	6-12 weeks
3-10	6-12 weeks	12+ weeks

Proposed Policies

We have designed this volunteer program to have a light administrative footprint that fits within a small organization's bandwidth and culture. Accordingly, we recommend that the HDP Board consider the following set of volunteer policies.

Purpose
HDP's mission is best served by active participation from community members. We encourage the involvement of volunteers at all levels of HDP and within all appropriate programs and activities. We strive to create an environment for volunteers that is welcoming, impactful, fun and educational.

Volunteer Rights and Responsibilities
HDP's volunteers have the right to:
- Meaningful assignments
- To be treated as important and valuable co-workers
- Effective supervision and guidance
- A safe environment
- Full involvement and participation within the ability of a small organization
- Recognition for work done

In return, volunteers agree to:
- Perform their duties to the best of their abilities
- Remain loyal to the mission and values of HDP
- Ask questions when needed
- Follow organizational safety procedures and organizational policies
- Honor confidentiality
- Help maintain a welcoming, impactful, fun and educational environment for staff and other volunteers

Volunteer Equal Opportunity and Non-discrimination Policy
HDP welcomes people of all cultures, backgrounds, opinions, professions religions, and walks of life. HDP provides an environment free from discrimination, where people treat one another with respect. Decisions regarding volunteer placement and supervision are made without regard to race, sex, sexual orientation, religion, age, disability or other protected status or category.

Harassment
A respectful work environment is essential to the well-being of both paid employees, volunteers, contractors and everyone with whom HDP works. Harassment of an applicant, employee, volunteer or program participant on the basis of race, religion, color, national origin, ancestry, mental or physical disability, medical condition, political activity, marital status, sexual preference, sex or age will not be tolerated. Harassment includes verbal harassment, physical harassment, visual forms of harassment, and sexual harassment. All volunteers should speak to

their staff supervisor immediately if they are made to feel uncomfortable through any behaviors or comments of participants, staff or other volunteers.

Troubleshooting

Because recruiting combines the linear, methodical approach with the less linear arts of persuasion, inspiration and motivation, organizations commonly encounter challenges related to one of another side of the equation. Recruiting also represents the last easy place to cancel a project if a suitable qualified and reliable volunteer is not found: this is often preferable to investing a lot of training and time in to a volunteer who does not fit or is unable to complete the project.

Problem	Likely Cause(s)	Possible Responses	If Left Unattended
Not enough volunteers for project to succeed	• Incorrect recruiting strategy & instruments • Not enough follow through on postings and relationships • Overly ambitious expectations • Volunteer base is overtaxed/burned out • Problem with event (date, conflicting event, etc.)	• Revise strategy and instruments if time allows • Hedge bets by securing a core group early • Reschedule or downscale project • Cancel project • Post-mortem recruitment strategy to avoid repeat	• Disheartened staff/volunteers • Organizational skepticism about volunteer involvement
Not enough of the right skillset, availability, etc.	• Recruitment strategy not correct for type of position • Timeframe not conducive to demographic you're reaching • Qualifications not clearly defined • Availability expectations unreasonable	• Recalibrate strategy and instruments to reach a more targeted group • Restructure position to avoid availability barriers (weekends/evenings/ long-term, etc.) • Review qualifications • Seek advice from those in the field this position relates to	• Cancelled project • Poorly filled positions that result in poor volunteer performance and added burdens on staff
Too many volunteers	• Enthusiasm for HDPs work • Strategy cast too wide of a net	• Redirect to other available project or future dates • Quickly identify and open other opportunities • Scale up ability to manage more people if possible • Redirect to other organization • Congratulate yourself for being popular!	• Volunteers who feel they're not needed are unlikely to return • Strains on volunteer management capacity • Tail wagging the dog: creating projects to accommodate volunteers instead of achieving HDP's highest priorities

| Organization only able to recruit one type of volunteer (episodic or leadership) | • Staff/leadership excels at one part of the recruitment skill set (methodical vs. inspirational) and neglects or struggles with the other
• Lack of variety/continuum in volunteer opportunities | • Focus on neglected approach and skill set
• Bring on volunteers to help with recruitment to fill skill/approach gap
• Create volunteer opportunities at all levels | • Leadership pipeline will struggle, becoming too top-or-bottom heavy, or missing middle level with too big a jump |

Chapter 4: Volunteer Management

Narrative

Phase Overview

The Volunteer Management phase is the most time-consuming part of the volunteer program. It is also the most critical: even if HDP defines good projects and recruits excellent volunteers, if those volunteers are poorly managed, their work will suffer, the volunteers and staff alike will get frustrated, and projects will need to be rescued at the eleventh hour.

The Volunteer Management phase is also the hardest to anticipate: how long it will really take to manage a group of volunteers or a project. It involves both managing projects—planning, managing timelines and keeping things moving—and managing people—which tend to defy planning and requires time to manage comfort levels, stress, joy, frustration and enthusiasm.

In a small organization such as HDP, some false starts with under-managed volunteers will occur. Staff time will filter out those who cannot work independently or who prefer a structured, routine environment that HDP will not always be able to provide. This is part of the fast pace of an entrepreneurial organization.

Volunteer Orientation

Orientation vs. Training

Volunteer orientation and volunteer training are frequently confused. Orientation is to introduce volunteers to the organization. Training is to give them the specific knowledge and skills needed to achieve their tasks.

Volunteer Orientation
Purposes:
- Familiarize volunteers with HDP
- Introduce volunteers to key personnel
- Allow volunteers to withdraw early if not a good fit

Critical Elements (See Sample Orientation Agenda on page 61)
- HDP's mission, work, and culture in both formal (mission, etc.) and inspirational form
- Introduce volunteers to key personnel
- Allow volunteers to withdraw early if not a good fit

Conducted by: HDP Executive Director

Format: Single event conducted in groups; volunteers may be working on different tasks

Volunteer Training:

Purposes:
- Familiarize volunteers with their task: purpose, definition of success, timelines, expectations, and supervision framework
- Establishing clear expectations for independence, projects, risks, check-ins, and when staff will review work, if applicable
- Project guardrails: set clear expectations about what the volunteer should not do: i.e., when they need to ask for permission/clarity before proceeding.
- Get volunteer questions answered
- Provide connection, support, and feeling of inclusion and value in HDP

Critical Elements (See Sample Agenda on page 63)
- Clearly defined tasks as well as ability to depict why it will help HDP
- Sensing/discovering volunteers' knowledge, skill and comfort level and responding accordingly
- Clarity about how supervision will work as the project evolves
- Ability to adjust
- Appreciation

Conducted by: Volunteer's direct supervisor, most often HDP Executive Director

Format: Ongoing, specific to volunteer(s) working on a particular task or project. Generally heavier at the beginnings of projects, and lighter as the project goes on, the volunteer becomes more comfortable, and the supervisor is confident things are moving ahead as intended.

Volunteer Supervision

Supervising volunteers is almost identical to supervising staff. While people commonly think volunteers are "not getting paid", they are **absolutely getting paid. They're just not getting paid in money**. They are, depending on the volunteer, getting a chance to contribute to HDP's mission, meet like-minded people, build professional skills, get out of the house, have fun, and any number of other motivations. Their urgency to be there is less immediate than paying their rent or mortgage, and volunteers may be less reliable than employees, but they are definitely getting paid. And with that comes both the expectation that 1)they are accountable to HDP to fulfill their commitment, and 2)HDP must hold up its end of the bargain and make sure they get what they came for in the experience.

The significant differences between supervising volunteers and supervising staff are:
1. Because volunteers are getting paid differently according to their motivation, supervisors must know each of their motivations individually and ensure they're met
2. Because volunteers can be less reliable based on family and work demands, and on how interesting they find the project, supervisors must work harder to stay in communication, make sure the volunteers know the project's impact, and keep their energy high.

3. Volunteers tend to come from a wider variety of backgrounds than staff: widely varying ages, outlooks, extent of professional experience, etc.
4. Because volunteers come and go more frequently, volunteer managers must be careful not to assume the understanding of HDP's context, history, or a familiarity with nonprofit organizations.
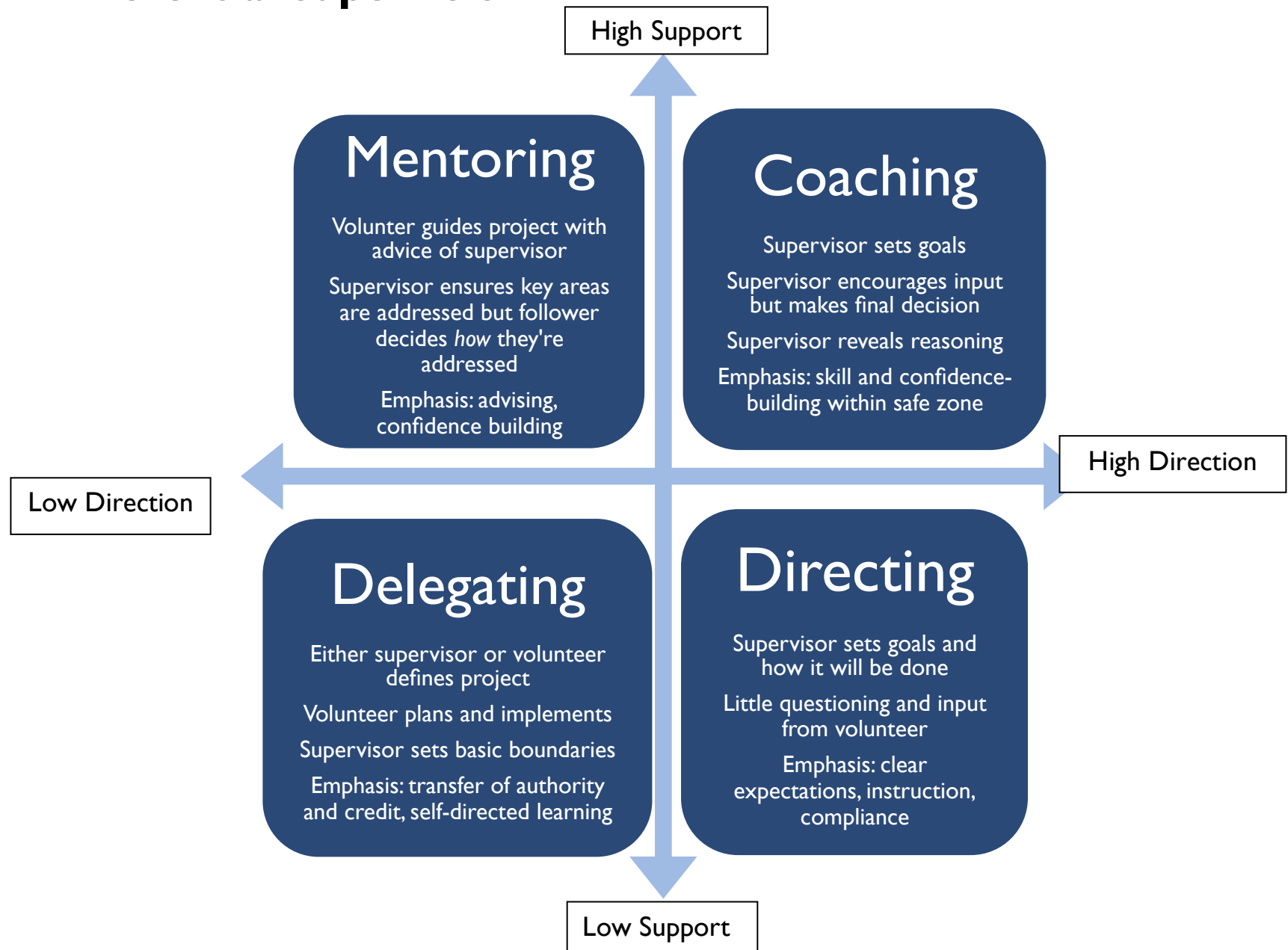
Supervision Framework

Many guides have been written about supervision. The model below will be the most useful for volunteers because it is task-centric as well as person-centric. Because many volunteers will only be with HDP for a the duration of a single project but some will volunteer for months or years, this balance makes this model a useful for HDP.

This model balances support and direction based on what the volunteer needs to achieve a particular task. The supervisor's "style" (i.e. a preference for delegating and moving on to other things, or retaining control of details and making the decisions) is irrelevant: they need to be able to shift to whatever style is needed based on the relationship between and the volunteer and the task.

Direction is prescriptive decision making by the supervisor: instructing the volunteer to achieve X and to do it by doing Y and Z.

Support is knowledge and comfort-level expansion facilitated by the supervisor: building confidence and skills, creating a larger understanding of the project by the volunteers, and helping them think through how the project is done and why it is or could be done one way instead of another.

Differential Supervision

High Support

Mentoring

Volunter guides project with advice of supervisor

Supervisor ensures key areas are addressed but follower decides *how* they're addressed

Emphasis: advising, confidence building

Coaching

Supervisor sets goals

Supervisor encourages input but makes final decision

Supervisor reveals reasoning

Emphasis: skill and confidence-building within safe zone

Low Direction

High Direction

Delegating

Either supervisor or volunteer defines project

Volunteer plans and implements

Supervisor sets basic boundaries

Emphasis: transfer of authority and credit, self-directed learning

Directing

Supervisor sets goals and how it will be done

Little questioning and input from volunteer

Emphasis: clear expectations, instruction, compliance

Low Support

Over time, the volunteer will move through the stages counterclockwise as they develop familiarity with their tasks. Many short-term volunteers may not fully progress to the delegation phase unless they come to the task with some applicable skills and the trust of their supervisor.

Direction: the supervisor tells the volunteer what to do and how to do it. There's little room for questioning or discussion. This approach gets tasks done, and is appropriate when a task is by nature inflexible, there's no room for error or needs to be done quickly. It doesn't build skills, and if volunteers are directed too heavily they will often look elsewhere to grow.

Coaching: the supervisor still decides what to do and how to do it, but the volunteer is asked for input and the supervisor's reasoning is revealed. This provides some learning, but the project is still controlled by the supervisor.

Mentoring: the supervisor hands off much of the decision making about the project to the volunteer, but still engages them in discussion about their approach. This serves two functions—it helps the volunteer build their understanding of skills and incorporate the experience of the supervisor. It also allows the supervisor to spot flaws and help the volunteer address them.

Delegation: the supervisor hands the project off to the volunteer, with a "let me know if you need help" type of support. The volunteer is free to make decisions within the original framework without discussion or asking permission. This obviously implies a lot of trust in the volunteer.

Using This Framework
To use this framework, HDP's ED (and others supervising volunteers) should keep a few things in mind:

1. Start With Direction
    Tempting as it is for a busy person to want to simply hand off projects quickly to volunteers (delegation) most volunteers will not be successful if not given some direction at first. This ensures that projects start off well. Most volunteers are unable to self-assess their ability to do whatever the task is, especially complex tasks that require judgment.

2. Don't Be Overly Directive With Skilled Volunteers
    Directive styles are appropriate when speed is of the essence, or when there are limited options for how something is done (planting trees, serving food, etc.). Beyond that, direction without the inclusion in the thought process of the supervisor (coaching) shortcuts one of the main reasons people volunteer: to feel included in the organization's work. It also weakens the supervisor's ability to build the volunteers' skills and assess their leadership potential.

3. Invest Time
    Most small organizations have a default tendency toward directing and delegation simply because they are the fastest for busy staff in the short term. If these tactics don't fit the

volunteers' needs, they will be penny-wise but
pound-foolish. Beware this tendency when it's not appropriate.

4. <u>Keep an Eye on Culture</u>
Volunteer management is one of the places that a culture of volunteerism (pages 13-15) can weaken. When things get busy and the tendency is just to tell volunteers "what to do to get the project done" and this can erode the organization's habits that support volunteers themselves. Organizations with a strong volunteer culture will sometimes knowingly reduce their project throughput in order to engage volunteers more deeply and build their skills when they feel this culture is under threat.

Volunteers Managing Other Volunteers

Some volunteers (volunteer leads) will direct and supervise the work of other volunteers. This will allow the HDP to manage and supervise more volunteers than the HDP could do alone. This form of organizing volunteers is most common during events, but can occur in other areas as well. Some committee chairs will also take on various lead volunteer roles. Lead volunteers also provide a critical rung in the HDP's leadership ladder between short-term project volunteers and committee members.

The ED has a key role in developing strong volunteer leads to supervise projects and other volunteers and in assessing who has the skill set, experience and personality to do so. The ED will need to support these volunteer leads in 1) managing the project details and 2) organizing and managing their team of volunteers.

Assessing Potential Volunteer Leads

- Give the lead a single project with specific timeline and responsibilities, with supervision as the primary duty. See how they perform. You may want to pad the timeline so they can learn on the job without failing.
- Have the volunteer shadow the ED or volunteer supervising the activity for a month or less. Keep them in the information loop and let other volunteers know this person will take over for a short period of time.
- At the end of the first or second week (or month, depending on the job), hold a full review of what happened. Identify strengths and challenges. Offer assistance in the challenging areas.
- Depending on their performance with the short assignment, either expand or focus their responsibilities.

Supporting Volunteer Leads

The ED's job will often be to support lead volunteers so they can be effective managers of a larger pool of volunteers than the ED could support alone. Supervision of lead volunteers is very similar to how the ED will supervise regular volunteers: using the Supervision Framework

(pages 54-57), determining the right mix of direction and support needed to help them manage their team. Best practices include:

- Working with the lead to develop a clear project definition and a timeline and end date
- When a new lead takes on a project, being available and checking in regularly (more frequently than necessary when they have more experience)
- Clearly define the responsibilities of the lead volunteer
- Understand their motivation for taking on the role and respond accordingly.

Make lead volunteers feel part of a larger cohort of elite lead volunteers that problem solve together rather than work in isolation. This builds a feeling of camaraderie as a select group.

- Recognize them at a level higher than regular volunteers, one that still fits their motivation for volunteering (pages 51-55).
- Engage them in the debriefing of their event and planning of the next one.
- Offer public recognition

Core Skills and Traits for Management Phase

7. <u>People Management and Communication</u>
    Managing volunteers is managing people. The skills to motivate, inspire, direct, and guide a set of volunteers who don't have to be there comes to the forefront in managing the diverse projects, personalities, and motivations in this phase. Communication, listening, setting clear expectations, and problem solving are critical skills

8. <u>Project Management</u>
    At the same time that HDP leadership must manage the personalities of a diverse group of volunteers, volunteer managers must ensure that projects are completed. This means drive and accountability must be combined with understanding and mentoring.

9. <u>Grace Under Pressure</u>
    Time is always limited. The ED will always be torn between volunteers, projects and other responsibilities. The best volunteer managers find ways to make volunteers feel supported, valuable, and able to succeed even when they are stressed or moving quickly between volunteer and other meetings. This is a critical aspect of maintaining a culture of volunteerism in HDP even at the fastest-paced times of the year.

<u>Processes, Practices & Templates</u>

Volunteer Recognition Framework

Volunteer recognition is both a formal and informal process, and HDP should select and engage elements of both.

Formal recognition are the programmatic planned ways of recognizing volunteers (lunches, thank you notes, discounts with downtown businesses, public recognition on social media, websites, newsletters, awards, inclusion in decision-making, etc.

Informal recognition refers to the small unplanned activities that are part of HDP's culture: saying thank you, spending time talking with volunteers outside of project work, choosing to share other information about the organization and its work, soliciting input, etc. Many of the subtle aspects of a strong volunteer culture (pages 13-15) are also forms of volunteer recognition.

<u>Beyond the Volunteer Recognition Dinner</u>
It is often less critical *how* organizations provide volunteer recognition then that they do it *somehow*, often in many small ways. Depending on HDP's volunteer base, and their desires, the official volunteer recognition celebration events (such as the stereotypical recognition dinner) may be less effective at making volunteers feel that their work is valuable and want to continue to volunteer than other tactics. These events are also time-consuming to put on and only appeal to a small percentage of volunteers.

Volunteer Types and Recognition Options

HDP can design its recognition options with three types of volunteers in mind. Volunteers' motivations and mindsets tend to fall into three broad categories, and different types and recognition work for each group.

These are obviously generalizations, and most people have some elements of each type, but also have a dominant motivation. HDP's organizational culture and mission likely selects for a certain type of volunteer as well. This can help HDP shape its volunteer recognition. HDP can also add preferred types of recognition to the volunteer tracking (page 63) although this may be more formal than necessary.

Affiliation-oriented volunteers value relationships with groups: other volunteers, staff, committees, and organizations. They enjoy spending time together and probably do enjoy traditional "volunteer dinners" and other social opportunities. They tend to not like conflict within the group, and want to feel welcomed and appreciated for who they are.

Achievement-driven volunteers are committed to achieving important goals. They want to know that work makes a difference and that they're performing at a high level. They welcome challenges. They want to get better at what they're doing, so they look to build knowledge and skills that will help them do this. They are less loyal to organizations than to missions, and if they feel their time isn't resulting in something they'll volunteer elsewhere. They want to be appreciated for what they've done and how it's moved the needle.

Influence-oriented volunteers seek to maximize their impact by using the levers of power that affects what they care about. They value having a seat at the table, either within HDP or other venues where the mission is translated into reality, and they are often eager to join boards or projects that affect policy and put them in contact with important people. They

value access, participation in decision-making processes, and public recognition. They tend to have a lot of ideas and can become impatient with routine tasks. They want to be appreciated publicly, and for the influence they've had and the positive outcomes it helped bring about.

Each group also requires different approaches to recognition:

Type	Formal Recognition	Informal Recognition	What They'll Hate
Affiliation-oriented	• Volunteer luncheon/dinner • Thank you notes • Profiles on website about who they are • Awards and recognition within the organizational family	• Casual gatherings with other volunteers and staff • Recognition in internal newsletter to volunteers • Unhurried meetings/chats with staff	• Debate about how to make project better • Meet and greet with stakeholders/elected officials, etc. • Public recognition
Achievement-oriented	• Skill development, workshops or classes they can use to build skills • Focus group about how to make project better • Profiles on website about what they've achieved	• The next challenge • Debates about how to make project better • Feedback on the impact of the project • Inclusion in planning the next project • Trust to get work done with minimal oversight	• Volunteer luncheon (we could be getting something done) • Thank-you cards (waste of a stamp) • Long meetings without action
Influence-oriented	• Meet and greet with board, elected officials, etc. • Public recognition in news media, website, social media, etc. • Profiles on website about how they've been influential • Titles, business cards, official role • Letters of recommendation	• Ask for input on strategy • Sit in on committee/board meetings • Recognition as a future leader • Career connections • Judicious trust with organizational knowledge	• Volunteer luncheon, unless important people are there • Awards unless important • Focus group about larger strategy

In addition to recognizing individual volunteers with different orientations, there are two other volunteer types that should be recognized:

Volunteer leads are the people who mobilize, organize and communicate with volunteers in various partner organizations that provide HDP with volunteers. As described on page 35-36, these partners will range from church groups and scout groups to corporate partners. HDP should recognize them in two ways:

- *Helping them recognize their volunteers within their own organization*: they will need ideas, tools, and any thank-you items HDP can provide (discount coupons, etc.)
- *Thanking them in a way that is visible within their organization:* The volunteers and leadership of their own organization probably has no idea how hard they worked behind the scenes to mobilize people.

Gatekeepers in large and corporate partners are the people who control access to communication with their members and employees (pages 35-36). HDP probably spent months cultivating them and will need to recognize them as well.

- *Giving them recognition for the role they play personally:* Gatekeepers often have relatively thankless jobs (in that they control/restrict access) and thanking them personally is critical to maintaining the relationship.
- *Giving them information they can share with leadership*: Gatekeepers will need information about your progress, achievements, and the organization's involvement that they can feed directly to their management. You'll need to give them information in the form their leadership will understand quickly. This information will usually have to speak for itself, without HDP being there to explain it. Be prepared to customize reports and metrics.
- *Milestones:* Don't wait until a project is complete to thank gatekeepers and provide information they can feed to their management. Do this at all major milestones in a project—planning, when you hit a certain recruitment target, when a project starts, hits a midpoint, etc.

Collecting Data

Collecting data from volunteers a double-edged sword. The more data HDP collects, the more powerfully it can target volunteers for future opportunities and can report more easily on the volunteer program to board, funders, and other partners. However, collecting data and analyzing it takes up limited staff time, increases the administrative burden, and can be off-putting to potential volunteers. Sharing a lot of personal information can be a particular barrier to volunteers from communities of color, immigrant families, or those with ties to countries with authoritarian regimes.

To maximize critical information gathered from volunteers, while keeping the burden on staff and volunteer slight, we recommend gathering the following information at this time. Future funders may require more information in the future.

Type of Information	How Gathered	Use
Name, Phone #, Email Address	• Volunteer Application • Sign in Sheet (legibility is critical) • From group leader if volunteer in a group	HDP communication RE: recognition, newsletter, future opportunities
Volunteer Interests, General Availability	Volunteer Application	Match with future opportunities
Emergency Contact Person and Phone #	Volunteer Application/Sign in	In case of emergency
How They Learned About HDP	Volunteer Application	Informs staff of most effective form of outreach
Job/Place of Employment	Volunteer Application (optional)	Informs staff of volunteer makeup
Part of a Key Group (Corporate team, etc.)	Volunteer Application/Sign in sheet	Reporting to key stakeholders
Above/below 18 on X Date	Volunteer Application/Sign in sheet	Ensure parental permission

Note: we recommend *against* tracking volunteer hours as a matter of course, as noted here and described more in Chapter 5 (page 70). HDP staff should communicate to volunteers that may need to document hours for school, community service or other purposes that HDP is willing to provide letters of verification of volunteer service if requested.

Managing Event Volunteers

Events are a large component of HDPs work, and some particular systems work best for managing large numbers of event volunteers, may of whom are likely to be volunteering at HDP for the first (and possibly only) time, and who often volunteer as part of a group.

HDP should recruit a set of lead volunteers who take responsibility for a defined aspect of a one-day event, and who supervise volunteers involved in that area (food service, ticket-taking, cleanup, etc. These volunteer leads direct specific areas of event operation under the direction of the ED or overall event manager. In most cases, the lead volunteers will supervise event volunteers, but will not have recruited them.

ED support for lead volunteers

Less experienced lead volunteers may either over or under-estimate the numbers of volunteers that they actually need. Work with lead volunteers to be sure the one-day volunteer job description and number of volunteers accurately reflects the work the volunteer will be asked to do. Because this organizational history will often be lost as lead volunteers change, the ED should keep records for future years.

Recruiting Event Volunteers

Recruiting and placing event volunteers is an accelerated process from that of mid- or long-term volunteers. While most people will be able to fill many typical event positions, some positions require special knowledge, licensing or training. Place these skilled volunteers in position as soon as possible.

Training Event Volunteers

Most event volunteers can receive their training on the day of the event shortly before event setup starts, or the day before. For more specialized roles, that require more
in-depth training, it's best to do this training within a week of the event date at the event site, if possible. This gives the volunteer an opportunity to arrive prepared to succeed on event day.

Guidelines for One-Day Volunteers

Scheduling and Arrival
- Have a designated and clearly marked volunteer check-in booth.
- Be sure volunteers staffing the check-in area are knowledgeable about volunteer operations and are scheduled before and after the event to support volunteers at the beginning and end of their shifts, set up the booth and to ensure staff continuity and support for the event coordinator and security agencies.

Welcoming Volunteers
- Be sure all volunteers sign-in and provide their emergency contact information, either when they arrive or beforehand if they apply online.

- Clearly communicate what will happen next, i.e., "our ticket-taker team volunteers will be meeting in five minutes just to your right under the banner, Ticket-taker Team".
- Hand out t-shirts, nametags and swag bags at this time.

Orientation

- Briefly, clearly and simply explain who HDP is and why the work the volunteer provides is important., (i.e., who will benefit, what will be accomplished)
- Share details for key event components and housekeeping items. All volunteers should have a clearly identified contact person who will help them in an emergency, know where restrooms, food and beverages are located.
- Address security and safety. These are critical components to cover during orientation. Address how they should respond to:
  - First-aid situations
  - Lost children
  - Catastrophic emergency
  - Possible event disruptions, protests, etc.
  - Cell phone info for event manager

Training

Training is accelerated at one-day events. It will often take only a few minutes and can be merged with orientation. Provide written instructions whenever possible, as well as hands-on training.

Supervision

Help event volunteers feel successful and have fun. Volunteer leads should have a roster of volunteers by shift and be available at all times to answer questions, trouble-shoot, and ensure volunteers take breaks and have time to enjoy the event. Take pictures of volunteers that can be shared online and with the volunteer in a post-event thank-you message. Practice "management by walking around": checking in often on folks and seeing how things are going.

Recognition

Thank volunteers continually throughout the event and always at shift end. A heartfelt and genuine "thank-you", remains the most valued form of recognition volunteers receive. Post event, send a message recognizing the individual volunteers and which key accomplishments succeeded.

Post-Event

- Send a thank-you message to volunteers and to any gatekeepers in partner organizations that sent volunteers to the event.
- Provide final attendance roster and hours and photos
- Debrief and share photos with volunteer lead and/or ED. Invite volunteer leads to be part of the event debrief.

Releasing Volunteers

It may be necessary to release (or fire) a volunteer. While many people who are poor volunteers or don't share the mission of HDP tend to filter themselves out by simply not volunteering, sometimes there a project or interaction is proceeding poorly enough that the volunteer should be released, whether immediately or after attempts at correction and/or coaching. Some of the situations where this might occur are:

- Volunteer is unreliable and/or does not communicate, leaving HDP in the lurch
- Volunteer behaves offensively to HDP staff, board, partners or other volunteers
- Volunteer does not follow important policies and procedures, causing risk or damage to HDP's operations
- Volunteer behaves in an unsafe manner
- Volunteer acts inappropriately regarding confidentiality, representation of the organization, public statements, social media, or relationships with major partners
- Volunteer is unable to perform the tasks, even with additional support, at a level that is useful to HDP (this volunteer may be appropriate for other tasks if interested)

Depending on how supervision occurs, issues may be raised by other volunteers, partners, lead volunteers, or other individuals, who bring them to the ED to determine solutions.

The final decision to release a volunteer is the responsibility of the ED. Depending on the severity of the issue, the time frame, and the ED's assessment of the best approach, ED may choose to skip steps in this process:

1. Discuss areas that need improvement and agree to how it will be addressed
2. Follow-up with mentoring and resources needed to help the volunteer make changes.
3. Releasing the volunteer
4. Document the release and reasons for it (do not skip this step)

Tips to a Volunteer Release Meeting

- Privacy
  Conduct the meeting in a private setting. Have a second person present: this reduces the risk of two competing stories and allays concerns about safety.

- Be Quick, Direct and Absolute
  Announce, don't debate. The meeting is simply to communicate to the volunteer they are being released. Expect the volunteer to vent, but keep quiet and do not respond.

- Do Not Attempt to Counsel
  If counseling were an option, you would not be having this meeting.

- Be Prepared to End the Discussion
  At some point, you may need to announce that the discussion is over and that it is time for them to depart.

- Follow-up
  Make sure you also follow-up with others. Inform other volunteers who worked with this person: you do *not* need to inform them of the reasons behind the change. Simply inform them of the change and how their project will move forward.

- Document
  After you release a volunteer, document the release using the form on page 82. This provides a record should the dismissal become the topic of a complaint or legal action.

Volunteer Communications Calendar

A key aspect of retaining volunteers is to stay in communication with them even when you don't need their help on an immediate project. As anyone who has donated to a charitable organization knows, if they only hear from that organization when they want a donation, they will believe that the organization only values their money, not their involvement, opinion, or participation in the organization's "extended family." The same is true of volunteers.

For this reason, we recommend that HDP send out at least a quarterly electronic email newsletter to all volunteers sharing what's new with the organization, what projects are coming up, asking for their opinion, and other exciting news. This also gives HDP an easy, cost-free way of cleaning its volunteer email list. There is no reason this newsletter needs to be solely dedicated to and sent only to volunteers—it could also be sent to donors, businesses, etc. But it should include volunteer-relevant content.

Quarter	Possible Topics
Spring	• Spring events • Upcoming volunteer roles • Thanks to volunteers • Volunteers Chime In (topics like favorite spring thing to do in Hillsboro) • Board member profile • News from the street (what's new in Downtown Hillsboro) • What's new at HDP? (HDP news, changes, etc.)
Summer	• Summer events • Upcoming volunteer roles • Thanks to volunteers • Volunteers Chime In (favorite place to eat outside, etc.) • Board member profile • News from the street (what's new in Downtown Hillsboro) • What's new at HDP? (HDP news, changes, etc.)
Fall	• Fall Events • Upcoming volunteer roles • Thanks to volunteers • Volunteers Chime In (trick or treating costumes and photos) • Board member profile • News from the street (What's new in Downtown Hillsboro)

	• What's new at HDP (HDP news, changes, etc.)
Winter	• Winter events • Upcoming volunteer roles • Thanks to volunteers • Volunteers Chime In (favorite downtown holiday shopping business, travel plans, etc.) • Board member profile • News from the street (what's new in Downtown Hillsboro) • What's new at HDP? (HDP news, changes, etc.)

SAMPLE Volunteer Orientation Agenda

Section	Activity	Purpose
Welcome	Greeting	Kicks off orientation
Introductions	• Introduces volunteer to people • Staff and leadership • Ground rules	Introduces volunteer(s) to ED, other leaders, breaks ice, first experience of HDP culture
Introduction to HDP	Presented discussion-style • Mission • Key programs • Values • History • Future plans • Importance of volunteers to HDP	• Seek to inspire as well as inform • Volunteer commits to HDP values. • Surfaces personal philosophies that may indicate not a good fit for volunteer.

Volunteer Operations	Introduce:
	  • Mutual expectations
	  • Volunteer-related policies
	  • Provide "tour" where and when work gets done.
	  • Key timelines and events
	  • Sign volunteer agreement
		• Clear expectations
		• Clarity on what volunteering will be like most of the time

Questions?	Open to questions	• Clarifies unresolved issues • Allows volunteers to select out
Closing		

SAMPLE Special Event Team Lead Orientation Agenda

Section	Activity	Purpose
Welcome		Kicks off orientation
Introductions	Interactive game that teaches names Why did you volunteer?	Introduces volunteer(s) to ED, other leaders, breaks ice, first experience of HDP culture
Introduction to HDP	Presented discussion-style • Mission • Key programs • Values • History • Future plans • Importance of volunteers to HDP	• Seek to inspire as well as inform • Volunteer commits to HDP values. • Surfaces personal philosophies that may indicate not a good fit for volunteer.
Volunteer Operations	Introduce: • Job description of team leader • Volunteer comfort and care • Why event volunteers volunteer • Prioritizing volunteer enjoyment, learning vs. project completion	• Clear expectations • Understanding of their role • Seeing project through eyes of a one-time volunteer
Event Details	• Preparation • Check-in and orientation • Missing volunteers • Long lines • Customer Service • Safety • Break management • Situations that arise	Prepares team leaders for situations likely to arise and how to address them
Communication	• Contact list • When to communicate • Schedule	Expectations and vehicles for communications
Questions?	Open to questions	• Clarifies unresolved issues
Closing		

SAMPLE First Training Session

Volunteer training will vary highly with the nature of the task. This template provides a general framework that HDP can adapt to different positions.

Topic	Activity	Purpose
Welcome	Meet & Greet	Create welcoming atmosphere, introductions
Organizational overview	Brief review of mission, values, history and major programs	Inspirational more than informational, review from volunteer orientation
Housekeeping	Tour: Show desk or work area, phone, restrooms, etc., introduce to staff	Builds confidence and sense of place.
Position Description	• Review project purpose, goals, and position description • Review volunteer agreement • Provide access to files, computer & work area	• Establishes clear project • Stresses importance of project • Provides resources needed to complete activity
Supervisory Process	• Set or confirm schedule/timeline • Give contact info for supervisor • Set communication expectations for sick/ change schedule, etc.	• Creates expectation for timeliness • Sets communication expectations
Initial Training	• Can be done as "show and tell" or shadowing a current volunteer if applicable • Encourage questions and hands-on learning	• Begins volunteer activity • Adjust to skill level of volunteer
Training check-in	• Develop check-in timeline based on volunteer skills and progress made. • Debrief on volunteer skills, needs and comfort	• Supervision at level appropriate for volunteer • Provides check-in to ensure project moving in desired direction
Questions?	Encourage proactive questions	Opportunity for less formal check-in on work QA/QC
End of first day	Check work and progress Make corrections	Check-in
Closing	• Ask questions • Point out progress volunteer made/information learned • Highlight importance to HDP	• Establishes progress • Keeps focus on impact on HDP's work

Troubleshooting

Problem	Likely Cause(s)	Possible Responses	If Left Unattended
Quick and insufficient Volunteer Orientation	• Limited staff bandwidth	• Use replicable outline • Plan regularly scheduled orientations rather than ad-hoc	• Volunteers won't understand organization, culture, or expectations
Quick/Insufficient Volunteer Training	• Limited staff/lead volunteer bandwidth	• Step back and provide clarity as soon as possible before volunteer is frustrated or project fails • Reassess timing of projects	• Will result in poor results, garbled communication, frustrated staff and volunteers
Volunteers generate low-quality work, requiring staff time to fix	• Insufficient training • Insufficient vetting for skills • Overly ambitious project	• Increase both training and support • Increase direction • Consider rescheduling project until more support is possible • If recurrent, recalibrate go/no-go decisions (Phase 1)	• Weakens program delivery • Weakens organizational confidence in volunteer program
Volunteers behave badly to staff or other volunteers	• Insufficient orientation & expectation-setting • Insufficient supervision	• Corrective behavior • Releasing volunteers • Addressing concerns of staff/volunteers treated inappropriately • Present expectations firmly	• Will result in loss of other volunteers • Potential harassment liability
Inadequate contact with volunteers during projects	• Insufficient staff bandwidth to manage projects & volunteers • Unclear expectations about checking in	• ED rigorously follows check-in protocol • Consider rescheduling project until more support is possible • Recruit with an eye to ability to operate independently and set clear guidelines	• Projects will go off on tangents and/or stall • Unsupported volunteers become frustrated
Too few lead volunteers	• Insufficient recruiting • Limited base of leadership talent • Unclear roles • Overly ambitious position descriptions	• Prioritize for personal recruiting • Shrink area of responsibility and time frame • Provide incentives (professional development, etc.) • Develop relationships based on that particular skill set	• Lead volunteer burnout (see below) • Staff strain
Lead volunteer burnout	• Heavy duty load • Longevity • Too few lead volunteers	• Prioritize for personal recruiting • Encourage off-time • Show impacts of their work • Build their skills • Have fun	• Turnover of key people • Lack of energy among volunteers they supervise • Atrophy of leadership pipeline

Unreliable Volunteers (consistently inconsistent)	• Outside pressures (family, job, etc.) • Unclear that their absence has an impact • Poor communication about details	• Clarify communication • Find reason for unreliability • If outside pressures, accommodate as best you can while brainstorming how the project can work • Immediately note absence/lack of follow through and inquire why, stressing impact on others	• Staff/Lead volunteer frustration • Projects miss timelines
High rate of attrition (above expected rate)	• Demographics (mobility, family, job changes, etc.) • Lack of growth • Lost passion for mission • Experience wasn't fulfilling	• Find out reasons for attrition and respond accordingly • Continually find ways to fit roles into shorter time frames • Have fun • Showcase other opportunities more often	• Strain on recruiting and training systems
Important volunteers leave mid-project	• Outside pressures (family, job, etc.) • Overestimated their time commitment • Frustration with project	• Set clear expectations on outset • Depict critical nature of project at outset • Ensure backup institutional knowledge; have lead volunteers work in teams if possible to pick up torch (not always possible or desirable) • Put project on hold until volunteer available • Revise recruitment priorities • If project is critical, consider use of reserve funds to professionalize • Honor their service	• Critical projects can struggle

Chapter 5: Volunteer Program Assessment & Course Correction

Narrative

Phase Overview

This phase describes how HDP can assess the success of the volunteer program, identify weak spots, and help the program change course in response. Because HDP is a growing organization, it is likely that this program design will shift slightly: the design was designed for nimbleness with this in mind.

Internal-Focused Evaluation
HDP is fortunate to have no funder mandates for speciifc metrics related to the volunteer program. This gives HDP an opportunity to:
- Measure what has internal adaptive value for HDP that can trigger program changes
- Minimize staff time spent tracking and reporting data in the spirit of the program's light administrative footprint (pages 7-8).

If HDP grows and pursues additional funding sources that have reporting requirements, adding additional metrics may be necessary at some point in the future.

Developing Volunteer Leadership

In Chapter 2 (pages 20-21) we recommended how HDP can use its volunteer program to identify future leaders, ascending a ladder of involvement from short-term volunteerism to longer-term involvement, possible ascending to committee members and chairs. Of course, many volunteers will stop partway up this ladder not because of their skill or desire but because of the time and schedule demands of longer-term involvement and the competing demands of jobs, family, etc.

Part of the Adjustment and Course Correction for HDP should include:
1. Assessing to what extent volunteers are in fact moving up this ladder
2. If potential leaders reach roadblocks related to time, availability, family, etc. (rather than interest, skill, etc.), HDP should seek creative ways to restructure some of its leadership roles to be more accessible.
3. Recognizing that leadership prospecting is a continuous process.

To turn these processes into reality, we recommend the following actions:

1. Annually reviewing lists of board members, committee members, and committee chairs and identifying how
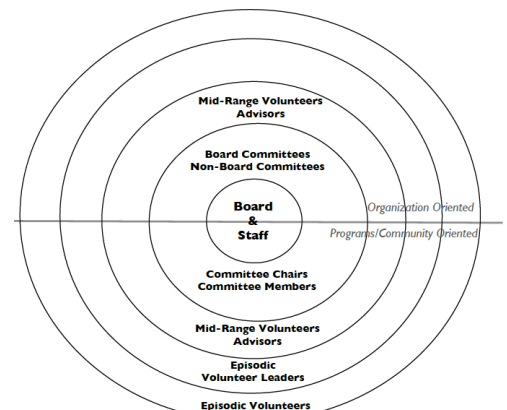
Note: Attrition occurs at each stage due to interest, time, etc.

they became connected to HDP, and replicating these strategies
2. Tracking the number of people filling mid-term roles that have leadership potential and interest, but are simply unable to make a longer-term commitment. When this becomes a recurrent theme, create meaningful but shorter-term leadership roles (one to three months) or that don't involve meeting during the business day, etc. Examples are task forces, single meeting to seek input, tasks that can be done independently but feed into the board and committee work (plan development, policy creation, referrals, etc.)
3. Formalize prospecting for each committee: review names of prospects at each meeting, continually ask members for names of other prospects, Board/Committee Development Committee, etc.

Core Skills and Traits for Assessment & Course Correction

5. Objective Analysis
   This phase also requires some objective distance from HDP programs: the ability to set aside personal investments that come from being deep in the implementation of HDP's work and being the organization's most foremost public advocate. HDP staff will need to be able to analyze data for trends, make clear-eyed assessments of what is working, what is not, and what qualitative and quantitative measures indicate may be needed.

6. Strategic thinking
   Assessment and course correction are fundamentally about strategy: *is the program being the best catalyst it can be for HDP's mission? If not, why?* What should be done next, and how can HDP gather the buy-in, resources and time to make the needed changes? How should these changes be prioritized in the context of other things happening at HDP? The ED will be driving this set of question as the program moves forward. The ability to assess a situation, develop options, chose one, and engage others in this process will be critical as the program moves forward. This requires periodically stepping back from the fast pace of program delivery.

7. <u>Persuasion</u>
   Course corrections—even at the operational level of a volunteer program—are about changes, and changes always require making a strong case. When a course correction is brought forward, key stakeholders in the volunteer program—committee chairs, committees, Board and volunteer project leaders—will need reassurance that any changes will be both worth the inevitable time investment and will result in a better program.

Processes, Practices and Templates

Recommended Measures of Success

Indicator	What it May Tell HDP	How to Use Indicator	Audience	Methodology	Reporting
Number of projects that have been improved by volunteer engagement based on coordinator feedback	Whether volunteer program is an asset for program delivery	Triggers replication of characteristics of successful projects	ED Board	Complete Volunteer Project Evaluation Form after project completion (page 83)	• Quarterly update to board • Annual assessment informs next annual workplan
Number of volunteers	Whether involvement is rising or falling	Triggers assessment of why (seasonal, program changes, lack of volunteer response, good/bad/neutral, etc.)	ED	Track number of volunteers on volunteer tracking spreadsheet/CRM	Quarterly (staff only)
Number of volunteer opportunities that failed (and why)	Areas of weakness in volunteer program	Triggers search for weaknesses in program (why were these not vetted out in prioritization phase? Was recruitment insufficient? Etc.)	ED	Project Evaluation form after project ends or is abandoned	•Quarterly (staff only) •Annual assessment informs next annual workplan
Number of volunteer opportunities bypassed (and why)	Extent of unfulfilled potential Ability of HDP to generate sound projects	Determines if 1) good projects are being bypassed due to staff limitations and/or 2) if HDP is generating (and vetting out) poorly conceived projects	ED Board	Review Bypassed Volunteer Projects forms (page 75) HP decided not to move forward. Sort by reason	• Quarterly update to board • Annual assessment informs next years' budget process and priority-setting
Number of volunteer engaged in multiple projects or leadership roles	Extent to which volunteers are becoming more deeply involved in HDP's work	Identify possible future leaders; if building a broader	ED Board	• Track individuals who volunteer across different projects/areas • List of board/committee prospects	Annual
Results of Volunteer Satisfaction Survey	Extent to which volunteers feel their service is impactful and rewarding	Adjust volunteer management	ED	Annual electronic survey	None

A Note on Volunteer Hours
Most volunteer programs report their success by measuring both the number of volunteers and volunteer hours. These are useful measures in some situations, but we believe they are overused as indicators of the success of volunteer programs. We specifically don't recommend that HDP collect and track volunteer hours at this time, for the following reasons:
- The number of volunteer hours has little bearing on either the success or importance of volunteer projects: some require many volunteer hours and some require few by the nature of the project, not the ability of HDP to recruit and manage volunteers.
- In some cases the number of hours is a sign of efficiency (engaging a lot of people in a project or lengthy project that relieves staff). In others it is a sign of inefficiency (what could be done with 20 volunteer hours is done with 30).
- As the saying goes, "If you don't measure what you value, you'll end up valuing what you measure". Over time, most organizations feel pressure to meet targets and to increase these targets over time. Many volunteer programs struggle to meet volunteer hour targets that are ultimately not meaningful.
- Tracking volunteer hours puts a burden on staff and volunteers. Hour are often no tracked accurately or estimated, further diminishing its value for either measuring success or making program adjustments.

Establishing a Baseline
HDP should establish a baseline before launching this volunteer program to allow for comparison as the program is implemented. Because of the inevitable seasonal nature of events and volunteer involvement, this baseline should come from the last full program/fiscal year. This may involve some retroactive research and institutional memory to generate lists of volunteers, projects that were completed, projects that were bypassed, etc. and will inevitably be imperfect. This research itself could be a volunteer project.

Building Internal Support for the Volunteer Program
Most volunteer programs struggle to attract the attention and understanding from organizational leadership that is necessary for adequate resources, informed decision making and program planning. In many ways, this is understandable and even proper: boards typically focus on higher-level strategy, fiscal management, fundraising, and delegate the program-level strategy to the ED and staff. HDP's small size and rapid evolution indicates that the Board should have an understanding of the reasons that the program is being created the way it is, how it can be a catalyst to HDP's, work, and what it needs in order to succeed. This knowledge will allow the Board to monitor the key strategy, budget and capacity issues without needing to wade into program details. We recommend the following steps to ensure the Board has an adequate understanding of the volunteer program:
- A summary of this program design be presented at a board meeting
- The ED provide quarterly updates to either the board or the board's Program Committee on the volunteer program, what it has produced, its needs to succeed, staff activity and what the programs' unrealized potential is. Over time, as the board becomes familiar with the program these can be done annually as part of an overall program review.

Adjustments & Risks

Balancing the Administrative Footprint:
How Light is Too Light? How Heavy is Too Heavy?

This program is designed with a light administrative footprint to fit the needs of a small, nimble organization with large growth potential; at the same time, it does institute some minimal administration (strategic prioritization of volunteer needs, better tracking of volunteer contact info, volunteer waivers, coordinated communication with volunteers, and program evaluation) that is designed to increase program efficiency to allow for growth as well as minimize risk and lost opportunities.

HDP staff and leadership will need to balance along a continuum: how light a footprint is too light so that it becomes too chaotic or valuable information is lost? When is it so heavy that it becomes too cumbersome and bureaucratic? HDP's ED and leadership will be adjusting along a continuum as the organization becomes more familiar with the program and the HDP evolves.

Some general guidelines are:

The administrative footprint may need further investment if these situations or similar ones occur <u>repeatedly</u>:
- HDP struggles to produce accurate lists of volunteers and/or recontact them for future volunteer opportunities
- Routine operational activities, such as where to post volunteer opportunities, how to conduct a volunteer orientation, how to recognize volunteers, etc. are subject to continual reinvention of the wheel
- Key data (project forms, volunteer contact info, etc.) sits unentered
- Staff and committee chairs struggle miscommunicate about what volunteer projects are moving forward and/or who is supervising volunteers

The bureaucratic burden may be too high these situations or similar ones occur <u>repeatedly</u>:
- Volunteer opportunities are bypassed in favor of completing *volunteer-program related administrative tasks* (not other HDP administration or finances), even when some of these are handed off to volunteers
- Data is tracked and analyzed but not used in either internal HDP planning and budgeting or reporting to outside partners/funders
- Staff and key volunteers question the efficiency of volunteer engagement due to administrative requirements (not the ability of volunteers to meaningfully contribute).

Troubleshooting

Problem	Likely Cause(s)	Possible Responses	If Left Unattended
Warehousing: data is collected but not assessed	Insufficient staff bandwidth	• Data analysis can be a volunteer/intern project • Establish regular review points	• Problems go unidentified and unfixed • Program develops inertia • Inability to budget time and money for needed changes
Inaccurate data: (garbage in, garbage out)	• Inattentive data entry by volunteers/staff • Poor handwriting on forms	• Better training/ supervision/QC on data entry • Reformat forms and/or shift to tablet entry	• Volunteer contact info becomes useless for contacting the HDPs' strongest supporters
Assessments point to adjustments but adjustments aren't made	• Limited time/bandwidth for creative thinking by staff/committees • Focus on next project	• Establish clear "planning window" with minimal projects • Make full use of committee members (small task forces)	• Staff stops recommending changes • Program develops inertia
Program not shared with board in a meaningful way to impact strategy	• Board bandwidth limited • Board focus elsewhere	• Presentation to board after six months of implementation. • Integration into annual budgeting process • Formation of Board Program committee (beyond project scope)	• Board defers program strategy to ED (works well as long as resources are adequate and integrated into strategy and budgeting). • Can result in decisions based on poor understanding

Forms

Volunteer Opportunity Form

Project: _____   Volunteer Position: _____

Date: _____   Completed by: _____

                                                            Committee: _____

Project

- ☐ Events   ☐ Organizational Infrastructure
- ☐ Programs & Promotions   ☐ Fundraising
- ☐ Land Use & Advocacy   ☐ Other _____
- ☐ Communications & Marketing

What will the volunteer do? _____

_____

The deliverable/scope/outcome from this project will be: _____

_____

Start Date: _____   Completion Date: _____   Flexible? ☐ Yes ☐ No

Volunteer

Skills needed: _____

_____

Hours/week: _____   ☐ Weekday   ☐ Weekend   ☐ Either

# of People Needed: Minimum:_____   Maximum: _____

Support Infrastructure

Is the project ready for someone to start right away? (defined, approved, etc.)   ☐ Yes   ☐ No

If not, what is needed first? _____

Expected supervision workload : ☐ Low   ☐ Medium   ☐ High

Decision

☐ Move Forward   ☐ If time allows, at ED's discretion   ☐ Not at this time

Bypassed Volunteer Projects

Date: _____ Committee: _____Completed by: _____

Project	Reason bypassed (see codes)	Bring forward in future? (Yes/No)	Notes

Reasons Bypassed (Chose all that apply):

I: Not important enough to HDP's mission   **D:** Project not sufficiently defined   **S:** Insufficient staff time for management and support   **R:** Not confident HDP can recruit a volunteer with required skills and/or time   **A:** Awaiting funding, approval, permits, etc.   **O:** Other

Volunteer Position Description Template: Episodic

TITLE:

NAME OF PROJECT/EVENT:

DATE:

DESCRIPTION OF ACTIVITY:
(Include, skills, training, working conditions)

LOCATION:

RESPONSIBLE/REPORTS TO:

AGE REQUIREMENT:

TIME COMMITMENT: One-time

GOALS OF THE PROJECT:

BENEFITS OF VOLUNTEERING:

SHIFT(S):

DESCRIPTION OF ACTIVITY:
(Include, skills, training, working conditions)

WHAT TO WEAR/BRING/EXPECT:

DIRECTIONS TO SIGN UP:

Volunteer Position Description Template: Mid-Term

TITLE:

DESCRIPTION OF ROLE:

LOCATION:

RESPONSIBLE/REPORTS TO:

AGE REQUIREMENT:

IMPACT Of THE PROJECT (goals):
-

BENEFITS OF VOLUNTEERING:
-
-

RESPONSIBILITIES (or Summary of Duties):
-
-
-
-

SKILLS/QUALIFICATIONS:
-
-
-

DESIRED EXPERIENCE:
-
-

BENEFITS OF VOLUNTEERING:
-

TRAINING PROVIDED:

WORKING CONDITIONS:

TIME COMMITMENT:

TO APPLY:

Volunteer Position Description Template: Leadership

TITLE:

LOCATION:

RESPONSIBLE/REPORTS TO:

TIME COMMITMENT:

DESCRIPTION OF ROLE (or Position Summary):

IMPACT OF THE POSITION: (goals)
-

BENEFITS OF INVOLVEMENT:

PRIMARY RESPONSIBILITIES (or Summary of Duties):
-
-
-
-

SKILLS/QUALIFICATIONS:
-
-
-

TRAINING PROVIDED:

WORKING CONDITIONS:

Hillsboro Downtown Partnership Volunteer Application

Contact Information   Today's Date: /   /

First Name:	Last Name:
Street Address:	
City:	State:	Zip
Company/School/Group?	
Best phone number:	
Can we text you?	Yes	No
Email	
Emergency Contact	
Phone:	Relationship

Parent/Legal Guardian Consent (required for youth): see parental release

Why are you interested in volunteering?

☐ Gain work experience
☐ Service Learning/College
☐ Support HDP's mission
☐ Court-ordered

☐ Employee involvement program
☐ Other (describe)
_____

I'm interested in volunteering in:

☐ Events
☐ Land Use, Planning & Advocacy
☐ Organizational Infrastructure
☐ Programs & Promotions

☐ Communications & Marketing
☐ Fundraising
☐ Other (describe) _____

List experience/skills/interests that might be relevant:

_____

_____

_____

Are you interested in? ☐ one-time opportunities   ☐ ongoing/repeated opportunities

How did you hear about Hillsboro Downtown Partnership?
_____

_____

Can we contact you about future volunteer opportunities? ☐ Yes   ☐ No

Application Processing Instructions

Activity Name:		Volunteer Supervisor:	
Date Received		Volunteer Placed?	☐ Yes ☐ No
If yes, position:		If no, reason:	
Next Steps:	☐ Send Confirmation ☐ Schedule Interview ☐ Recontact in future ☐ Do not recontact		
Notes:			

Volunteer Agreement & Waiver

<u>Photography and Videography Waiver</u>
Staff or volunteers may photograph or video volunteers and use the images for volunteer appreciation and outreach purposes. Images are the property of Hillsboro Downtown Partnership. By signing this form you acknowledge and agree to such use.

<u>Volunteer Insurance Waiver</u>
As a volunteer, you are <u>not</u> covered by the Hillsboro Downtown Partnership's (HDP) Workers Compensation program. You are, therefore, urged to have your own health insurance in the event you are injured while performing your volunteer duties.

You <u>are</u> covered by the HDP's General Liability Insurance in the event of property damage or accidental injury to the public as a result of your performance of volunteer duties assigned by HDP.

Volunteers are not authorized to drive HDP or personal vehicles as part of their duties, but may on occasion be authorized to operate off-road equipment. If you operate off-road equipment, you must have a valid Oregon Driver's License. You will be covered for property damage or bodily injury to others resulting from an accident. You should have your own health insurance to cover yourself.

I have read and understand the foregoing information on volunteers and insurance. If I am injured, I understand I will not have a claim against HDP for injury and damages. If your child is under 18 years, the parent/guardian is responsible for arranging timely transportation to and from the volunteer activity.

Completion of this form does not guarantee a volunteer position with HDP.

Name: _____ (print clearly) Date: _____

Email: _____ Phone:_____

Applicant Signature (required)

_____
Signature   Date

(must be over 18 years old to sign)

Parent/Legal Guardian Consent (required for those under 18)
(If you are age 18 or over, please skip this section.)
If you are under 18 years of age, parent/guardian permission is required. By entering your name below, you are stating as the applicant's parent/guardian that you give your consent for the applicant to participate in volunteer activities with HDP.

Signature of Parent/Guardian:(first & last name)

Signature _____

Date_____

Printed Name of
Parent/Guardian_____

HDP Volunteer Release Record

Name of Volunteer: _____

Volunteer Position: _____

Supervisor: _____

Reason for Release (check all that apply):

☐ Providing false or misleading information on application
☐ Absenteeism
☐ Breach of confidentiality, policy or similar
☐ Failure to follow important policies and procedures
☐ Failure to meet standards for work and/or representing HDP to the community
☐ Inability to work well with staff, clients and/or other volunteers
☐ Intoxication or drug use while volunteering
☐ Persistent insubordination
☐ Persistent tardiness, poor communication, and/or irresponsibility
☐ Physically or mentally unable to work
☐ Other: _____

Explain and give examples of what led to dismissal and relevant warnings and attempts to get the volunteer to resolve the issue:

Date volunteer was discharged: _____

Person conducting discharge session: _____Position: _____

Please attach copies of appropriate records and materials related to discharge.

Volunteer Project Evaluation

To be completed by the volunteer supervisor/project leader shortly after project is complete

Project: _____

Completed by: _____ Date: _____

Of Volunteers: _____(attach List) ☐ Too few ☐ Too Many ☐ Just Right

Main Accomplishments: _____

_____

Challenges: _____

_____

_____

Suggested Changes: _____

_____

Would you consider this project a: ☐ Success ☐ Mixed Bag ☐ Failure