



A Guide to Volunteer Management





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GLOSSARY OF TERMS

Benchmarking- The process of comparing one set of measurements to another. This may be done for various reasons, such as to determine trends in a process over time, or to compare one organization's efficiency to another's.

Board Members- An individual who serves on the governing board of the organization.
Also Known As: Board of Directors

Chair- A person selected by the Executive Director or the board of directors to serve as a person in charge of a focused area of a specific project or event, such as being the Volunteer Coordination Chair).

Champion- A person selected by the Executive Director or the board of directors to serve as a person in charge of the overall details of a specific project or event.

Committee Member- A volunteer who participates with a committee that has formed for a specific function(to act upon a particular matter). Design, Organization, Business Development, Promotions, and Sustainability are amongst HMS's committees.

Event- Something that occurs in a certain place during a particular interval of time. Events may serve the purpose of being a community building activity and/or a fundraising effort (Ex. Springfest, Wine about Winter, Paella Dinner).

Executive Director- The person in a nonprofit organization ordinarily responsible for management of the day-to-day affairs of the nonprofit and responsible for the implementation of policies set by the board of directors.

One Time Volunteer- A person who volunteers for a predefined amount of time, typically for a shift at an event, or day project, such as a Planting Day.

Ongoing Volunteer- A person who volunteers on a regular basis, such as a committee member.

Project-A planned undertaking or organized set of services designed to achieve specific outcomes that begin and end within the grant period (if a grant in funding the project).

Survey Monkey-A web-based survey solutions, that gathers the insights we need to make more informed decisions.

Venture Portland- Venture Portland is a key partner in the city's economic development efforts to create new jobs and stimulate neighborhood business vitality. Venture Portland also supports the Portland Plan's goal of ensuring access for all Portlanders to a healthy, connected neighborhood.

Work Plan-Initially created by the Champion, the workplan addresses all aspects of a certain project/events details. It is suggested that each Chair also have a work plan for the section they're responsible for. A work plan is a great tool for ensuring that planning is happening in an efficient manner, and that no major aspects are overlooked.



A Guide to Volunteer Management

By Emily Wilken, AmeriCorps



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Volunteerism is very much alive in today's busy world with nearly 44% of Americans volunteering. The largest population groups finding satisfaction in donating their time and talents are baby boomers and young adults; those over 75, and retired persons, are spending an increasing amount of time in volunteer activities, too.

The challenge is to create opportunities for interesting and meaningful work that both furthers the goals of the organization and meets the needs of the volunteer.



"Wine about Winter" is a great example of the entire community pitching in to accomplish one common goal: showcasing Hillsdale's energy and lively interaction among friends and neighbors.

Much like a paid employee, volunteers should be able to expect a job description outlining duties and responsibilities of their role, an interview, an orientation to the organization, ongoing training, clearly defined supervision including performance feedback, and appropriate recognition.

Most groups engaging volunteers know that they would be more effective if they could make better use of their volunteers time. Managing volunteers in community projects is not effortless but with some initiative, creativity, and dedication an effective and rewarding volunteer experience is well within reach, regardless of your available budget or resources.

This guide provides practical tips and ideas for the Executive Director, Board President, Committee Chairs, Project Champions, and Volunteer Managers for working effectively with volunteers to create and sustain projects and events.

I. WORKING WITH VOLUNTEERS

1. Know Your Resources

Managing volunteers in your project involves designing volunteer positions, recruiting individuals with the necessary skills, screening, providing training and recognizing volunteer efforts.

Whether you're establishing a volunteer run project for the first time or overhauling a current project, the following tips will help you to work effectively with volunteers.

This guide, the Executive Director, and the Volunteer-Sub Committee are all resources in place to help you out along the way. Please, do not hesitate to reach out for advice and assistance during your volunteer management experience.

Volunteer Sub-Committee

Founded in late 2012, a sub-committee of the Organization Committee, the Volunteer Sub-Committee focuses solely on the effectiveness of HMS's volunteer program.

The committee continues to refine it's role within the organization. Thus far they have created this document, *HMS: A Guide to Volunteer Management*, and have identified activities that better ensure the health of the organization. They've recorded this information in an annual calendar format. Using this ready made calendar to plan and preform these suggested activities is both helpful, and a consistent way of managing volunteers.

Duties of the Volunteer Sub-Committee

The committee continues to refine it's role within the organization. Currently they:

- Annual review and update of this document, *HMS: A Guide to Volunteer Management*
- Annually review and update the **volunteer calendar**
- Organize the annual **FriendRaiser** event
- Organize orientation for large groups of newly recruited volunteers
- Organize Volunteer Networking Events
- Annually survey the Board of Directors
- Annually survey committee members
- Monthly Volunteer Recognition. For example: Make the stars for Star Volunteers and write the monthly "Volunteer Spotlight" eNewsletter column
- When requested, provide advice and support to project volunteer managers



Documents 1a., the Volunteer Calendar, and 1b., a FriendRaiser Work Plan can be found in the Resources section at the end of this booklet.

I. WORKING WITH VOLUNTEERS

Establishing a volunteer management plan does take time and effort; however, the rewards of a positive volunteer experience for all involved - including the volunteer manager - largely outweigh the effort in planning and managing the plan.

2. Make Sure You Have a Plan in Place

Having a plan in place for your project or event is vital to successfully engaging volunteers. A written project plan that clearly outlines your goals, objectives, and a prioritized task list will enable you to generate the support you need and to focus volunteer efforts.

Any given planning committee collaborates early on in the process to determine the various elements of their project/event: marketing & advertising, logistics, sponsorship, etc. This results in the creation of a **Master Work Plan** which is usually produced by the Champion of the project/event. Within this **Master Work Plan** lives a volunteer management section.

Just as all people have their own unique way of understanding, we also tend to present information in a personalized way. This is perfectly fine, and expected. Most important is that the entire committee understands the project/event objectives, and knows what their assigned tasks and deadlines are. Even if you are working on a project or event that has been done previously, stop and create, or revisit and update your project plan.

Having the plan in writing makes it easy to review the goals and objectives throughout the planning process.



I. WORKING WITH VOLUNTEERS

3. Set Up Your System

Knowing what you currently have in place, or need to put in place, to effectively manage volunteers, pays off.

Who Will Be Responsible For Volunteer Management?

Having at least one person focused on managing a project/event's volunteers is not a luxury, but rather, it's a necessity. The volunteer coordinator should be one of the first positions that's filled to help build momentum and ultimately sustain volunteer interest.

If you are a project/event Champion who is soon to be seeking a Volunteer Manager to join your team, read on to learn what type of individual you should be targeting.

If you yourself have been recruited to the position of Volunteer Manager, Board President, or Committee Chair, compare the list to the right with your personal traits. Not everyone will find that they are comfortable in all areas. If you find there are areas in which you feel you're lacking, that's perfectly normal; ask your team, or the Executive Director for additional support in those areas; consider taking advantage of the various training sessions offered by Venture Portland, the Portland Development Commission, and Oregon Main Street; all are either free, or come at an affordable cost of \$5.00 for lunch.

Traits and Characteristics of an Effective Volunteer Manager

- Integrity & Honesty
- Resilience
- Flexible
- Initiative

Core Competencies

- Interpersonal Skills
- Organizational Skills
- Detail Oriented
- Cooperate and Collaborate with Others
- Conflict Resolution
- Ability to Influence and Guide Others
- Communications (written & verbal)
- Problem Solving/ Analytical Skills
- Desire for Lifelong Learning

Document 1d., a Volunteer Manager Job Description can be found in the Resources section at the end of this booklet.



I. WORKING WITH VOLUNTEERS

Have One Contact Person

Best Practices at a Glance

- Use volunteer@hillsdalemainstreet.org
- During recruitment check this email daily, Monday-Friday
- Try to respond within 2 business days

It's important to have one person whose name, phone number, and email can be given out for volunteer recruiting, communication, and retention purposes per project/event.

We have an email address assigned specifically for this purpose, volunteer@hillsdalemainstreet.org, and the volunteer coordinator of any given project can associate their name and phone number with this email address for the duration of their project.

Please ask the Executive Director for the user name and password, and where they would like you to forward emails unrelated to your project.

It's extremely important to engage potential volunteers in a timely manner, before interest wanes. There's not much that's more damaging to an organization's relationship with a potential volunteer, than the individual feeling ignored, or under valued.

It is suggested that during recruitment efforts that email be checked daily Monday-Friday, and when possible responses be given within two business days. Even in the

case that you can't give a volunteer a definitive answer, let them know that you have received their request and will follow up as soon as possible.

Following these good practices will show respect for volunteers, as well as ensure that your inbox doesn't fill to a daunting level.

Examples of recruitment messages & basic communications can be found in section 2.4, "Communicating with Your Target".

How Will You Keep Track of Volunteer Information?

Proper record keeping is critical to your success. Consider all of the information that is necessary for following up with individuals who show an interest in volunteering: name, address, phone number(s), areas of interest, skills to offer, hours of availability, emergency contacts, etc. The more organized and accessible your volunteer information is, the easier it is for the group to share tasks involved in managing volunteers and delegate appropriate tasks.

Using the **ready-made forms for volunteers** to fill out is both helpful, and a consistent way of record keeping; more on that in section 2.5, "When Volunteers Step in the Door".

Document 1e., an example of a Volunteer Contact Sheet can be found in the Resources

I. WORKING WITH VOLUNTEERS

Communications for Champions and Committee Chairs

Best Practices at a Glance

Take the time to create your own communication plan. Take into consideration...

- The frequency of committee meetings
- The frequency of touching base with committee members who've been assigned tasks
- Your methods for helping to keep people on task
- The importance of setting deadlines

Volunteers in the role of project Champion, or a Committee Chair, act as the leader of their committee, project, or event. An effective communication style is essential to the productivity of the team. The quality of communication is often a big determining factor as to whether or not members have a good experience, or something less desirable.

Before taking on your leadership role, take the time to create your own communication plan, most of which you should share with your team members. If you are already in your position, take a moment to pause, reflect on what's been working well, and where you could improve your communication style. While this may seem like a tedious task, the process can prove to be relatively simple process, and the

benefits certainly outweigh the initial input of work.

Decide on the frequency your team should meet. Typically committee's meet on a monthly basis, and may ramp up to bi-weekly meetings in advance of a large event, or the kick-off of a large project.

Also, have a plan in place as to how often you want to touch-base with team members who have been assigned tasks. Checking in with members can be as simple a quick phone call, or email, to see where they are in their process, and if they have any questions or could use some assistance.

One of the most effective ways to keep a project on track is by recognizing the good work that people are doing; it's a sure fire way to energize the team. The setting of deadlines is by far the best way to manage a project. Deadlines allow for mutually agreed upon expectations.

Be sure that all deadlines are assigned and included in the meeting notes; and that the notes are sent out to all team members in a timely manner. As deadlines are approaching it is best to send out reminders. Many volunteers are balancing busy lives, and a soft reminder that a deadline is approaching is much appreciated.



II. RECRUITING VOLUNTEERS

1. Before You Begin to Recruit

Before you get going, consider your needs and expectations, as well as the volunteers' needs and what they can expect if they get involved: Begin thinking about how you will communicate these and other aspects of the project.

Your recruitment techniques will be very different if you are looking for a large group of people to help with the tasks associated with a large event than if you need one person to help write a grant application. Think about the skills and roles your project requires, rather than what volunteers can offer your project. While you'll need to be flexible to match skills and interests, try not to tailor tasks to fit the specific skills of volunteers - in the long run, this could set you off strategy and consume valuable time.

Job Descriptions

Job descriptions force managers to define the crucial elements of the job and allow volunteers to evaluate honestly whether or not they can make the necessary commitment to the job. Job descriptions are just as important for one-time events as for ongoing positions.

Job descriptions help the organization identify the job needs of the program and the work that needs to be done.

A well-written job description will help recruit and place volunteers effectively, and will assist in evaluating the performance of each

will assist in evaluating the performance of each volunteer, as well as, the overall success of the program.

In developing a job description, ask yourself the following questions:

- Can its' usefulness be made clear to the volunteer?
- Can this job be done satisfactorily on a part-time basis?
- Can you provide support staff if needed?
- Does the job consider the varied interests and skills the volunteer may bring, or value his or her community relationships?
- Is it probable that the kind and/or number of volunteers required for this job can be recruited?
- What is a realistic estimation of the time commitment involved?
- Can you imagine a person really wanting to do this job?

Document 2a., examples of Job Descriptions can be found in the Resources section at the end of this booklet.



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2. Identify Your Target Groups

Once you know the types of volunteer roles that need to be filled, and have an understanding of what motivates volunteers, you'll be better equipped to find the volunteers that have the necessary skills, experience, and interest.

It's best not to rely heavily on only one target group when recruiting; branch out and try to involve volunteers from many different groups. This allows you to widen HMS's network, and introduces a diverse population to our organization.

Target Your Recruitment By... Activity

When you need volunteers with special skills or experience, target your recruitment by the specific activity. Identify where you would typically find people with the skill sets you are looking for to accomplish that activity. Don't be afraid to invite people to participate even if you don't know them.

For example, if it's gardeners you need, target people that already garden on their own, such as members of gardening clubs, horticultural societies, shoppers at garden centers or green houses.

Consider recruiting individuals of varying ability levels. People with developmental and physical challenges are often interested and capable of participating in stewardship activities.

Availability

Many times there are no special skills required of a volunteers, just a willingness to help. Consider who would be available during the times you need help. Consider targeting seniors, retirees, stay at home parents, and university students with flexible hours that fall during business hours.

Location

People get involved with a project for many reasons and location is often one of them. Living down the street or owning a nearby business gives people an extra connection to the work being done and often makes a perfect fit for short but regular volunteer roles. Consider recruiting from neighboring residents, schools, businesses, and local places of worship.

Association

Annually, shortly after New Year, the Volunteer Sub-Committee holds a **FriendRaiser** event, although planning ideally begins in November.

Current HMS volunteers are the best promotion and recruitment tool around. Ask them to invite friends and family that are unfamiliar, or don't participate, in HMS activities, to attend a FriendRaiser event and recruit from the new faces.

FriendRaisers are also a great opportunity for volunteers from the many committees and projects to come together and socialize

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and celebrate, often times meeting for the first time.

District business owners and managers are also invited, both introducing the unfamiliar ones to our organization, and strengthening standing relationships.

For many this is a rare opportunity to chat with other business owners and managers, as well as an opportunity to meet residents.

If the timing is appropriate, share your volunteer needs with the Volunteer Sub-Committee so that they are able to include your needs in materials presented at the FriendRaiser. Ideally you will be able to attend the event, mingle, and identify individuals who may be interested in helping out with your needs.

We've worked with groups of people in the past that share common characteristics, associations, or experiences. Refer to the list in the right column to help target your recruitment efforts.

You will need to recruit differently for the various types of roles. What is appropriate for recruiting day project planters may not work for recruiting board or committee members. The list to the right identifies which method of recruitment we've previously been successful in recruiting for each type of volunteer.

A FriendRaiser Work Plan & Document 2b., Contact Information for the recruitment list can be found in the Resources section.

♣ One Time Volunteers

● Ongoing Volunteers

- Current Volunteers & Their Friends, Family, and Co-workers ● ♣
- Volunteer Lists from Past Events ♣
- HBPA Members ● ♣
- Hillsdale Neighborhood Association ● ♣
- Business Owners/Managers ●
- **FriendRaiser** Events Attendees ● ♣
- HMS Monthly E Newsletter Recipients ● ♣
- HMS Website ● ♣
- Social Media (Facebook, Twitter) ● ♣
- AmeriCorps Members ♣
- Campus Compact Members ♣
- Rieke Elementary School ♣
- Wilson High School Students, Parents, and Alums ● ♣
- Churches/Religious Organizations ♣
- PSU Alumni ● ♣
- Hillsdale Farmer's Market ♣
- Elders in Action ♣
- Hillsdale Library ♣
- Hands on Greater Portland ● ♣
- Posting Flyers ♣
- Classroom Visits ♣

II. RECRUITING VOLUNTEERS

3. Communicating With Your Target

What Motivates Volunteers?

Consider why volunteers would want to become involved. Simply put, what do they gain from involvement? These are some of the rewards of volunteering:

- New skills and/or experiences
- Friendships
- A stronger sense of community
- A real contribution to their neighborhood

Be sure to emphasize the benefits of volunteering and of the project in your recruitment message. People are attracted to a positive message; appeal to this sense!

Develop a Recruitment Message

Your recruitment message communicates what your group can offer potential volunteers while appealing to their motivation to get involved with your project/event. Communicate the job description (what the volunteer will do, the skills and attributes that are necessary for the position, and the time commitment required). The recruitment message should also clearly describe how the work will benefit community members and other key stakeholders, show the value of HMS, as well as how the position will meet volunteer needs and interests.

Also take into consideration that when targeting different groups you should tweak your core recruitment message to better relate to the groups' varied needs and familiarity with HMS. On the next page you will see an example of a tweaked core recruitment message for ***Wine about Winter 2013***. The underlined passage was added for the purposes of targeting Elders in Action volunteers, a group that is largely comprised of senior citizens. We decided to assume that Elders in Action members are largely unfamiliar with HMS and provided basic organizational information. On the next page you will also see a paired down version of the same message. This message was used on the HMS website, a platform where additional information about the organization is readily available.

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Note: The underlined passage was added for the purposes of targeting **Elders in Action** members.

We're pleased to announce Hillsdale's inaugural wine and food pairing event: Wine About Winter. By the beginning of February, most Portlanders are just plain tired of the rain and the cold. HMS wants to offer a reprieve from the dreariness of Portland winters, by providing a warm, cozy place for neighbors to get together around wine and food; and we'd love for you to join in the fun!

Hillsdale Main Street is a volunteer-run organization, with over 60 active volunteers, and one staff member to support them. With 5 committees, who have 3-5 projects each per year, we are always eager to welcome new faces!

An additional 75, or so, volunteers are needed to handle the various behind the scenes duties that make things go smoothly: set up the space, greet guests, sell tickets, help with the raffle, etc. Shifts are approximately 2 hours long, the space is mindfully accessible, and the variety of positions provides opportunities for all sorts of physical requirements. When their shift ends volunteers receive FREE admission into the event and can enjoy the fantastic evening that they helped to create! The last shift volunteers, which close down the festival, will get sent home with a bottle of wine, a pair of festival glasses, and the warm feeling of accomplishment!

It's a win-win situation!

Interested? Invite your friends to join in, and choose your position & shift before the schedule fills up: <http://hillsdalemainstreet.org/uncategorized/wine-about-winter-volunteer-positions/>

Hope to meet you soon!

Sincerely,
Emily Wilken

Project Coordinator | HILLSDALE Main Street
971.201.0546 | volunteer@hillsdalemainstreet.org
1509 SW Sunset Blvd, Suite 2B | Portland, OR 97239
www.HillsdaleMainStreet.org

And here's a paired down version used on the **HMS website**. We are able to remove some of the information because it's located elsewhere on the event's page:

Additional volunteers are needed to handle the various behind the scenes duties that make things go smoothly: set up the space, greet guests, sell tickets, help with the raffle, etc. When their shift ends volunteers receive FREE admission into the event and can enjoy the fantastic evening that they helped to create! The last shift volunteers, which close down the festival, will get sent home with a bottle of wine, a pair of festival glasses, and the warm feeling of accomplishment!

It's a win-win situation!

II. RECRUITING VOLUNTEERS

Just as we need volunteers for various positions, we too need to use various recruitment techniques. Types of volunteer positions can be filtered into three groups:

- One time (day-of events/projects)
- Ongoing (committee members, volunteers offering their professional services)

One time (day-of events/projects) Volunteer

Special events serve a wide variety of purposes, including educational, social, fundraising, and publicity functions. Most would be impossible to manage without the help of scores of volunteers.

Fortunately, volunteers for special events are among the easiest to recruit and train.

A relatively short-term commitment for an array of jobs is required, and all efforts culminate on the same target day or days. Special events frequently attract substantial media coverage-a plus for volunteers as the coverage gives their efforts, or at least the results of their efforts, public visibility.

Economies of scale apply in recruiting volunteers for large special events. Social, service, or other community organizations can be approached to handle specific functions. For example, the Wilson High School Key Club was recruited to manage the Coat Check for Wine about Winter 2013.

All of these new short-term volunteers will not only provide services during the special event but will also have the opportunity to learn more about HMS and its work. They

can be added to mailing lists for fundraising campaigns and for subsequent events, and can potentially become a repeat volunteer by joining a committee.

Ongoing Volunteers

Ideally, encouraging volunteers to rise to leadership positions will produce a continuing source of hardworking, knowledgeable, committed board members, committee chairs, and project champions.

As leaders they will have intimate understanding of what the organization does and why, as well as a clear grasp of the human and financial resources needed to get the job done. Many board members, however, for a variety of reasons, are recruited through other channels and can contribute much to the organization in the form of skills, expertise, and community and business connections.

We regularly need volunteers who have a very specific skill set, such as architectural knowledge, graphic design, etc. Many times individuals with these skills:

- Are currently employed - or -
- Are actively seeking employment

Have a clear job description, a realistic level of commitment figured out, and a time frame of expected deadlines that you are asking the potential volunteer to agree to. Sometimes these volunteers lend their skills to a specific project just one time, while others progress to joining a committee and volunteering on a regular basis.

II. RECRUITING VOLUNTEERS

4. When Volunteers Arrive

Best Practices at a Glance

- Interview your candidates
- Utilize the **Volunteer Intake Form** found in the Resources section
- Provide an orientation session
- Refer to the interview & orientation agenda's within this section

One time (day-of events/projects) Volunteers Interviews & Orientations

One time volunteers tend to have an "interview and orientation" via email or phone, performed by the project/event's volunteer manager.

Besides getting to know a potential volunteer, the interview/orientation process is especially important if you are looking for special skills and experience. An interview can be as simple as a short chat to discuss your mutual expectations, to learn if they have the right skills and experience, and to discuss the time commitment and goal of the arrangement. Look for good communication skills, a positive attitude, and enthusiasm.

Even if there is not a good match, it is a public relation opportunity for the volunteer to learn more about HMS.

Ongoing Volunteers Interviews

Typically the Executive Director performs the interviews and orientations for repeat

volunteers. Besides getting to know a potential volunteer, the interview process is an especially important experience. An interview can be as simple as a short chat to discuss your mutual expectations, to learn if they have the right skills and experience, and to discuss the time commitment and goal of the arrangement.

Be flexible in your interviewing. Let potential volunteers tell their story and express ideas and then probe into those areas that are important and need a fuller explanation.

Explore technical and social skills. Other desirable traits to look for include good communication skills, a positive attitude, and enthusiasm. Using the ready-made **Volunteer Intake Form** is both helpful, and a consistent way of record keeping.

If the position they initially voiced interest in doesn't turn out to be a good fit, explore additional volunteer opportunities.

The Interview at a Glance

- Have them fill out the **Volunteer Intake Form**
- Let them tell their story
- Discuss mutual expectations (job description)
- Do they have the right skills & experience for the position?
- Look for good communication skills, a positive attitude, and enthusiasm
- Discuss time commitment
- If it isn't a good fit explore other options

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Ongoing Volunteers Orientations

The Orientation at a Glance

- Provide basic information about how HMS works
- Explain the chain of communication
- Give them printed materials to take home, including a copy of the committee handbook, to be read before their training session.

An **orientation session** is a great way of welcoming new volunteers, providing basic information and helping them understand how HMS works. Give volunteers printed information that they can use in explaining, and hopefully happily boasting, about their work to family and friends. Ensuring that we have copies of printed materials is the responsibility of the Executive Director.

Document 2c., a copy of the Volunteer Intake Form can be found in the Resources section at the end of this booklet.



Scheduling Volunteers

Being prepared for volunteers arrival both shows your respect for their time and instills a sense of trust in your leadership, as well as trust in Hillsdale Main Street's organizational abilities.

It is substantially trickier to **schedule** a group of volunteers for a large event like Wine about Winter, than for a smaller effort such as the summer Movie in the Park events. Keeping the following tips in mind as you approach making your **schedule** will help you to be well organized and prepared on the day of your event/project.

Scheduling Tips

- Include all shifts and positions in numerical order
- Include only the necessary information: shift, position, volunteers name, day-of contact number, and any special needs notes such as limited mobility or allergies.
- Your **schedule** can be created by hiding unnecessary information from your **volunteer contact sheet**, such as volunteer addresses
- Overlap shifts by 15mins-30mins to allow time for any on-site training and the possibility of some volunteers arriving late

Document 2d., an example of a Complex Volunteer Schedule can be found in the Resources section at the end of this booklet.

III. TRAINING VOLUNTEERS

Training is the most valued form of volunteer recognition. Training can also be promoted through your recruitment strategy as an added benefit of participation.

Training is essential if you want your volunteers to have the information and know-how to successfully complete their tasks. Gather volunteers together and provide instructions so that no one wastes their time. Training is also an opportunity for volunteers to meet each other, learn new skills, or brush up on skills that have been unused.



1. One Time (day-of events/projects) Volunteers

Training for routine tasks, to be performed for a one or two day event/project, is best provided on the job. It's often difficult to find a time that works for a group of people to come together outside of the predetermined event/project hours. Especially for large recruitment efforts, take into consideration that volunteers are coming from across the city. It's not convenient for some to just "pop over" for a quick training.

Training time should be scheduled into both

the volunteers' and trainers' shifts.

An added benefit of training volunteers on location is it's often much easier to explain what needs to be done while physically in the environment the work will be performed in. The Volunteer Manager or Team Leader can work alongside the volunteers until they gain knowledge and confidence.

One Time Training At a Glance

- "Housekeeping"- restroom locations, where to take a break, where to leave valuables
- An overview of the position for which training is given
- Do's and don'ts for the particular job
- General characteristics of the group of individuals who the volunteer will be assisting
- Defining objectives to be met through volunteer assistance
- Specific activities to be carried out to meet the objectives
- Materials that the volunteer will use
- Defining the volunteers' role in relation to paid staff
- Defining of the staff member's role in relation to the volunteer
- Emphasize that questions and feedback are encouraged and welcomed

III. TRAINING VOLUNTEERS

2. Ongoing Volunteers

The Board President, Board members, and Committee Chairs must provide both bold leadership and steady stewardship. The tools and resources given to them should reflect the trends and challenges currently facing nonprofit leaders.

These resources should help guide and inspire conversations about good governance among Board and committee members and the Executive Director.

Documents 3a.-3b., found in “Board and Committee Training Tools” can be found in the Resources section at the end of this booklet.

Who Trains Who?

- The Executive Director trains the Board President with the past president
- The Executive Director trains a Committee Chair with the past Committee Chair
- The Executive Director & Committee Chair train a committee member



Board and Committee Training Tools

Training Documents:

- 3a. Managing effectively: Ensure they are self-aware about their **leadership and management style** (comfort zone) and the style with which the group is most likely to thrive.
- 3b. **Volunteer Handbook**: Gain clear and agreed upon expectations that clarify what the committee member will do and to what they can be held accountable.
- **HMS: A Guide to Volunteer Management**

Points of Conversation:

- Conflicts of interest
- Policies
- The importance of delegation
- Why are your committee members there? Is there congruence between committee member motivation and work the committee needs done? What support do committee members need to be successful?
- Ensure there is an agreed upon **work plan** that identifies what the committee will produce with timelines and assignments
- How to deal with below par performance? Have we agreed upon par? Have we given feedback? Have we tried to overcome barriers? The “is this a fit” conversation.
- Fostering leadership succession: Discuss building the team capacity over time and integrating that development process into the ongoing work of the group as well as setting additional time specifically focused on team building.
- The importance of diversity

III. TRAINING VOLUNTEERS

Volunteers providing professional services have been recruited to do a job that they have experience and, perhaps, expertise in. Training is job specific and covers such things as project details and the chain of communication.

More so, the quality of the professional volunteer's experience relies on the Executive Director's, or Committee Chair's ability to effectively delegate tasks.

In the case that a volunteer who is providing professional services is also in a leadership position, the Executive Director will give the volunteer the same training as a Committee Chair would receive.

4. Delegation

Delegation is defined as empowering one person to act for another, which is how we enable volunteers to do their work. Delegation is one of the most critical elements in the management of nearly all organizations. Each manager of volunteers must evaluate his/her own ability to delegate.



As a Volunteer Manager, ask yourself the following questions:

1. Do I have enough confidence in myself that I will not only accept, but actively seek out people who know more than I do about an area where I need help?
2. Am I willing to delegate significant parts of my project/event to qualified volunteers (and be glad, not threatened, if they succeed)?
3. Do the jobs I offer to high level volunteers make a sensible, logical whole, or are they bits and pieces of busy work that give the volunteer little opportunity for satisfaction or growth?
4. Am I willing to shift from being a doer to being an enabler? Can I become a good manager and find satisfaction in that?



III. TRAINING VOLUNTEERS

Volunteer managers, paid staff, and leaders may have difficulty delegating for these reasons:

- They feel a volunteer does not have enough information to do the task
- It is easier to do it personally than tell someone else how to do it and then follow up to see that it was done
- They want recognition for doing it themselves
- They think they have better ideas
- Personal insecurity about exposing their own lack of knowledge or weak area
- Lack of experience in delegation
- Inability to direct, think ahead or visualize the work requirements and project outcomes
- Fear of criticism for volunteers mistakes



The obstacles to effective delegation can be overcome by understanding some of the steps used by successful volunteer managers.

The following steps listed are designed for both beginning and experienced managers of volunteers who want to delegate more effectively.

- Define responsibilities clearly. Describe freedoms and limitations. This allows for consistency.
- Delegate complete segments rather than bits and pieces.
- Provide adequate feedback. Be honest and accurate in assessment of how they are doing. Emphasize what went wrong, not who did it.
- Set goals and performance standards together.
- Provide support through sharing knowledge, information, and plans with them.
- Commend and encourage them.
- Let go! Fully delegate and allow for personal success or failure. Delegation also involves the transfer of authority.

IV. RETAINING & SUPPORTING YOUR VOLUNTEERS

Active and committed volunteers are the key to success in any community project. Experienced volunteers are especially valuable because they already “know the ropes”. They are familiar with the goals of the organizations, and can provide inspiration and leadership to new volunteers. With volunteers juggling their many priorities and demands on their time, it can be a challenge to keep a steady pool of individuals to help throughout the year.



So what can you do to keep your volunteers inspired and involved? Here are some ideas for retaining and supporting the heart of your project - your volunteers.

1. Keep Volunteers Coming Back

Volunteers get involved for many different reasons and they have a variety of needs in respect to their volunteer experience. Your volunteers will have an enriching work experience and your project will be more successful if you meet the needs of your volunteers. In order to do this, here are some insights:

The Impact of Their Contribution

Volunteers need to know that their contribution is making a difference. For example, families who helped with the Capitol Hwy Landscaping Project will appreciate seeing how their involvement is benefiting their neighborhood. Our monthly eNewsletter is a great place to capture comments or quotes from students, residents, and business owners about how the landscaping improvements are affecting their neighborhood experience.

Providing the goals and outcomes of your project is a great way to keep volunteers focused on both the tasks at hand and the big picture. Consider communicating the outcomes of your effort by creating a photo record or by documenting such things as how many, and what species of flowers were planted by volunteers. Collecting this information can be a creative volunteer project.

IV. RETAINING & SUPPORTING YOUR VOLUNTEERS

Community Connection

Foster opportunities for volunteers of various projects to meet and get to know one another. Invite all volunteers to our annual FriendRaiser, traditionally held at the beginning of the year.

Connect volunteer contributions to the larger community through events that help them see how their work on one project fits in with the work of HMS volunteers on other projects.

Resume Building

Many volunteers feel that volunteering can help them find employment and this is a key motivating factor for these individuals. Volunteers value learning for personal growth as well as professional development, so try to ensure that there are opportunities for learning in volunteer positions. Find out what interests volunteers, and provide learning and training opportunities. For instance, you can match up a volunteer who wants to learn more about Portland signage guidelines with those knowledgeable on the topic. Introduce volunteers to our Lending Library, located in the HMS office; it's filled with books, publications, and other resources that can help build their knowledge.

A Sense of Belonging

Do not take your volunteers for granted. Build a team environment that includes your volunteers. Welcome them and treat them with respect and understanding. For example, if you are working outside on a hot day, make sure to regularly check in with volunteers to see if they would like a bottle of water, or to take a short break in the shade to cool off.

“Treat volunteers as equal partners - don’t be condescending! Provide whatever comforts and benefits you can get for them.” Dr.J. Hamr, Northern Heritage Institute

Choosing Their Role

Involving volunteers in deciding the role they will play empowers them to find a position that suits their interest, expectations, and schedule. At the beginning of your communication with a prospective new volunteer, provide a detailed list of all of the positions available, the tasks involved, and the physical demands of the position.

Try to make volunteer jobs interesting. Give everyone a great place to work, new experiences, and try to keep the atmosphere inviting and inspiring for all. Remember, the volunteer experience needs to be rewarding for them - and for Hillsdale Main Street.

IV. RETAINING & SUPPORTING YOUR VOLUNTEERS

2. Feedback is Golden

Being clear about your expectations right from the start is important, but expectations also need to be flexible. Recognize that a volunteer's needs and motivations change over time. Encourage volunteers to regularly check-in with you about their experience. Often times people find it much easier to voice their praise than if they're dissatisfied. After every event and project we ask volunteers to fill out a **feedback form**, which can remain anonymous.

It is best to keep **feedback forms** and surveys short, about ten questions that take about 5 mins or less to answer, with a mix of value based questions (rate experience 1-5), and reflection questions ("How could we have made your volunteer experience better?").

We've learned through experience that we have the best results if we encourage volunteers to fill out a **feedback form** after checking-out after their volunteer shift. When possible, we encourage participation through the means of a "Volunteer Raffle". All volunteers who fill out a **feedback form** receive entry into a raffle for items donated by Hillsdale businesses.

When it makes sense to, such as after a late night clean-up shift, pre-schedule a **Survey Monkey** email to be sent to all volunteers. As volunteers sign out let them know to look for the email. If offering a Volunteer Raffle

be sure to allow only a few days for folks to complete it and be entered into the raffle. Allowing only a few days relays a sense of urgency, as well as, doesn't make people wait too long to hear who the winner is.

We also **survey committee and board members** on an annual basis, usually in May, providing valuable feedback for the committee's Chair and the Executive Director. It's important to gain insight as to why folks are volunteering and if they are happy with their work and overall volunteer experience.

If they are dissatisfied, do something about it! Address the issues moving forward and adjust your methods for the projects that lie ahead.

If the work didn't meet your expectations, or those of your volunteer, work together to find an activity for the future that will meet both of your needs.

Document 4a.-4b., examples of a Volunteer Feedback Form and a Committee Level Survey can be found in the Resources section.



V. RECOGNIZING YOUR VOLUNTEERS

1. Recognize Your Volunteers Or Else...

A volunteer taken for granted quickly hits the road.

2. Use a Variety of Methods to Say “Thanks”

Volunteer parties and raffles can be valuable ways of acknowledging the contributions of your volunteers. Don't just rely on the end of project/events to acknowledge your volunteers and their efforts; make it a daily habit. Consider using the following informal and formal ways to recognize your volunteers; they are both inexpensive and effective.

Leadership, Responsibility, and Involvement in Decision-Making

There are lots of ways for volunteers to assume leadership roles and take on decision-making responsibilities. For example, when appropriate, invite a Day-Of volunteer to a committee meeting and ask for their input. Volunteers can also step up to lead groups at an event, coordinating and training other volunteers. The level of responsibility will likely only be dependent on the abilities, interests, and time commitments of the volunteer.

Training

Inviting volunteers to training opportunities, such as the regular workshops that **Venture Portland** offers, will help support them in their volunteer roles, introduce them to new interests, and give them additional skills.

Social Events

Project-wide, and organization-wide social events give volunteers the chance to get to know each other outside of their regular volunteer work. New friendships make for a more enjoyable volunteer experience, particularly for new volunteers.

In August 2013 the volunteer sub-committee plans to hold the first **Volunteer BBQ**. All volunteers and their families will be invited to celebrate the successes of the past year. For many it will be a unique opportunity to gain a big-picture view of the various projects that are in process simultaneously. This may lead to a richer understanding of how one project's efforts feed into meeting HMS's greater mission.

It is intended to be a family-friendly lunch- time potluck located in DeWitt Park. Lawn games and music will be provided and volunteer awards will be presented.

Star Volunteers

Every month the Executive Director, through conversations with all Committee Chairs, presents 3-5 “Star Volunteers” to the Board of Directors at their regular monthly meeting. These Star Volunteers are chosen based on of their exceptional work and support given to Hillsdale Main Street.

Volunteers craft the stars, with the recipients name on it, from art supplies provided by HMS. After they are presented to the Board, the Executive Director congratulates the recipients and hangs the stars in the HMS office's meeting space.

V. RECOGNIZING YOUR VOLUNTEERS

Volunteer Spotlight

On a monthly basis one volunteer is recognized in the Volunteer Spotlight column in the HMS's eNewsletter. The Executive Director chooses the volunteer based on the talents and time they've shared with HMS. The article is written by a member of the Volunteer Sub-Committee and typically addresses why the person volunteers, their history within HMS, and how their efforts lend to bettering Hillsdale. By choice, the volunteer who is "spotlighted" can also provide a little more personal information, such as what their career is, info about their family, and what hobbies and activities they enjoy outside of HMS. This is a nice way for people to gain a more personal connection to the work that HMS does.

3. Recognize Frequently

"The most effective form of recognition is day-to-day interactions. If you neglect your volunteers, you won't make it up to them in a formal ceremony." McCurley and Lynch.

Volunteer Management: Mobilizing all the Resources of the Community

Take advantage of the many opportunities to recognize volunteers, before, during, and after a project is completed.

- Recognize when a volunteer joins your project by sending a letter of welcome, providing introductions, orientation, and training.
- Recognize on a daily or weekly basis by providing on-going and informal thanks, encouraging supervision, and a smile.
- Recognize on a monthly basis by nominating someone for the eNewsletter's Volunteer Spotlight, or to be a Star Volunteer. Write an article for the eNewsletter or send a letter to the editor of a local newspaper highlighting the group's latest accomplishments.
- Recognize at the completion of a project or event by saying thank you, sending a card, or by hosting a celebratory event.
- Recognize when a volunteer leaves the organization by giving them a letter of thanks and offering to write them a letter of recommendation. Consider having an exit interview with the volunteer.



V. RECOGNIZING YOUR VOLUNTEERS

Accomplishments

Most volunteers will feel rewarded by the sense of accomplishment that comes from seeing a job well done. Show volunteers the results of their work in practical, tangible ways. Whether a volunteer has helped write a funding grant application, organized administrative record keeping, or planted and tended to landscaping, show and tell them about the improvements resulting from their contribution. Before and after pictures, verbal updates on the results of their efforts, and creating opportunities for them to connect with their work, are all straightforward ways that you can help volunteers understand the outcome of their efforts and feel a sense of accomplishment.

4. Other Things to Consider About Volunteer Recognition

- Recognize honestly—appropriate for the achievement
- Give recognition to the person, not the work
- Give recognition on a timely basis
- Give recognition for what you want more of
- Recognize effort, not just completion of a project
- Recognize specifically for what the person did and describe what went well

Document 5a., a Volunteer “Thank-You” Letter, can be found in the Resources section.

Board Members are Volunteers Too

The same basic steps should be followed in managing a successful, productive Board of Directors. Don't forget, they are volunteers, too, and need the following structure:

- Job descriptions to clarify expectations
- Interview to determine match between HMS's mission and the prospective volunteer's interest.
- Orientation to provide an overview of the organization
- Evaluation of board member's effectiveness
- Recognition

Exit Interviews

Interviewing Committee level volunteers as they leave the organization can be the best time to get honest answers about their experience with Hillsdale Main Street. They are also a great way to recognize that we value the input of volunteers as a means to improve the organization moving forward – and it may be cathartic for the person who's leaving. Most departing volunteers have nothing to lose at that point, and the organization can gain valuable insights. Although, the interviewer should be aware that some may say things just to blow off steam, and may not provide a full assessment of their experience.

Typical questions during an exit interview

V. RECOGNIZING YOUR VOLUNTEERS

Typical questions during an exit interview concern why the volunteer is leaving, how they felt about their level of commitment, their experience within their committee, as well as whether they would recommend volunteering with HMS to a friend.

A cardinal rule of such interviews is that they be confidential. The exit interviewer may be a member of the Volunteer Sub-Committee, or the executive Director. The interviewer should always ask "Do you mind if I share this with the Executive Director, or, Board President?" (whichever is applicable). **Document 5b., a Volunteer Exit Interview Questionnaire, can be found in the Resources section.**



Vibrant business districts don't just happen -
they need a **vision**,
they need **leadership**,
they need **coordination**,
and they need **participation** by
all members of the community.

RESOURCES

- 1a. Volunteer Calendar
- 1b. FriendRaiser Work Plan
- 1c. Master Work Plan with a volunteer management section
- 1d. Volunteer Manager Job Description
- 1e. Example of a Volunteer Contact Sheet
- 2a. Examples of Volunteer Job Descriptions
- 2b. Contact Information for Groups We've Worked With
- 2c. Volunteer Intake Form
- 2d. Complex Volunteer Schedule
- 3a. Leadership and Management Style
- 3b. Volunteer Handbook
- 4a. Volunteer Feedback Form
- 4b. Committee Level Survey
- 5a. An example of a Volunteer "Thank-You" Letter
- 5b. Volunteer Exit Interview Questionnaire

Additional Resources:

- 6a. Event Details Email For Volunteers