

STRATEGIES FOR RECRUITING, TRAINING, & RETAINING VOLUNTEERS

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EXECUTIVE DIRECTOR, DETOUR EMPOWERS

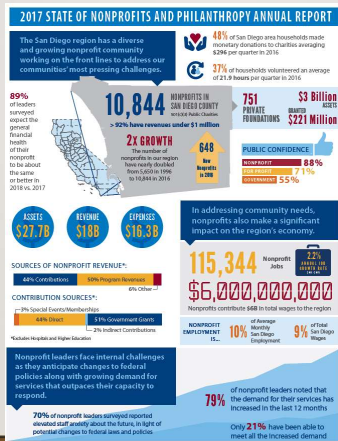
WORKSHOP OVERVIEW

- Importance of Volunteers
- San Diego Volunteers
- Organizational Readiness
- 5 Steps for Effective Volunteer Programs
- Resources

THE IMPORTANCE OF VOLUNTEERS

- Offset Organization Staff Expenses
- Secure Resources For Organization
- Add To Organization Culture
- Build Pipeline For Future Staff & Donors
- Provide Expertise According To Their Specialties
- Keep Organization Connected To Community It's Serving

SAN DIEGO VOLUNTEERS 2017 STATE OF NONPROFITS AND PHILANTHROPY ANNUAL REPORT



WHY DO PEOPLE VOLUNTEER?

- Personal fulfillment
- Learn new skills
- Develop existing skills
- Make social and professional connections
- To offer value to your organization

“Volunteers are far more likely to get involved in a program that can cater to their interests, passions, skill sets, and preferences.”
-Jeff Gordy

ARE YOU READY?

- Who's managing your volunteers?
- How much time will they do this weekly?
- Are your volunteer policies and procedures in place?
- Is your complete volunteer process in place?

EFFECTIVE VOLUNTEER PROGRAMS

- Meet the needs of the organization and the volunteers
- Have an effective system in place
- Have volunteers that feel appreciated and rewarded

5 STEPS FOR EFFECTIVE VOLUNTEER PROGRAMS



I. WHAT'S YOUR GOAL?

- What do you want to achieve with your volunteers?
- What role do they play within your organization?
- What should volunteers expect from your organization?

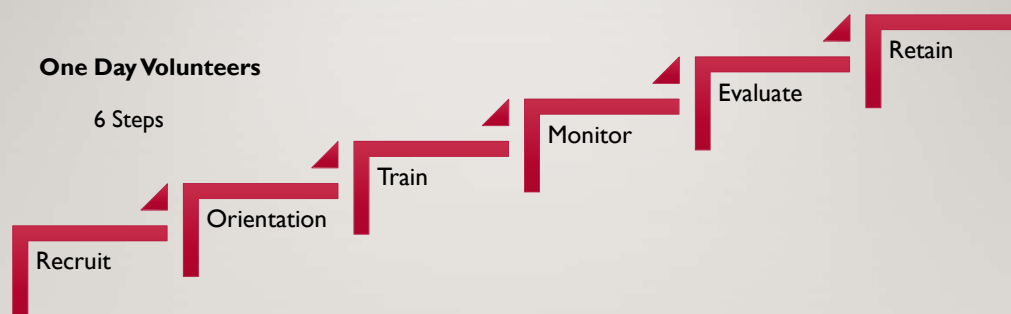
WHAT IS YOUR NEED?

| Ongoing Volunteers? | Leadership Roles? | Professionals? | Every week? Every month? | Students/Interns? | One Day Volunteers? |
|---|---|---|---|---|--|
| <ul style="list-style-type: none"> • Long Term (>1 year) • Short Term (<1 year) | <ul style="list-style-type: none"> • Manager • Group Leader | <ul style="list-style-type: none"> • Accountant • Lawyer • Health Care Professionals • Teachers • Tutors | <ul style="list-style-type: none"> • How many hours are required daily/weekly monthly/etc. | <ul style="list-style-type: none"> • Schools • Youth Programs | <ul style="list-style-type: none"> • Events • Canvassing • Phone Banking • Clean-ups |

WHAT IS YOUR CAPACITY?

- Do you have office space to work with volunteers?
- Do the volunteers have space in your office for meetings and activities?
- Can they work from home?
- Will their work be done in the community?

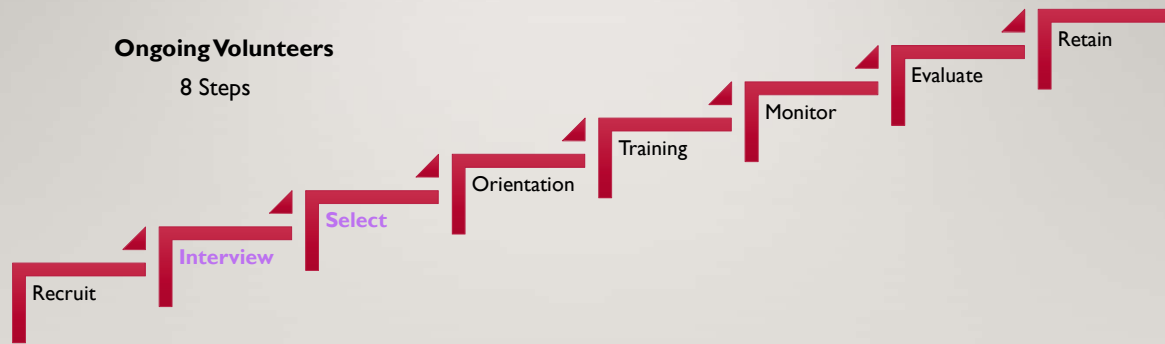
2. WHAT'S YOUR PROCESS?



WHAT'S YOUR PROCESS?

Ongoing Volunteers

8 Steps



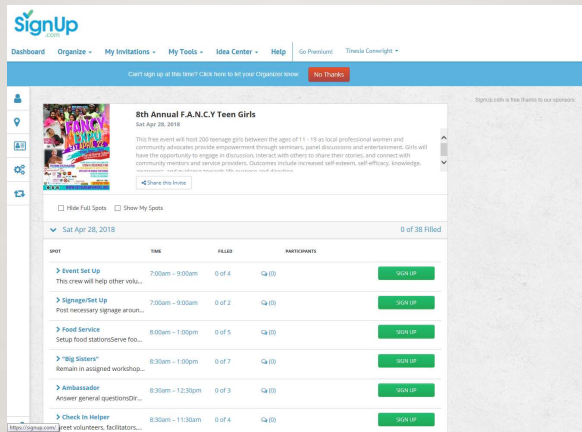
THE PROCESS: RECRUITMENT

- Where will you find volunteers?
 - Internal: Website, Newsletter, Social Media, Board, Current Volunteers, Word of Mouth
 - External: Online
 - ❑ Internships.com
 - ❑ Npworks.org
 - ❑ Volunteermatch.org
 - ❑ Eventbrite
 - ❑ Signup.com
- How often will you recruit?
- Will you host recruiting events?
- What's your timeframe for recruitment?

ONLINE EXAMPLES



SIGNUP.COM



RECRUITMENT TIPS 4 SUCCESS

- **Personalize Your Approach**

- Work with volunteers according to their specific interest, skill set, preferences, and passions to provide relevant opportunities that will mobilize them to get involved

- **Track**

- Input volunteer data into your donor database to track volunteer's past involvement and preferences (<https://www.capterra.com/volunteer-management-software/>)

- **Ask**

- Encourage volunteer surveys which include their skills and strengths, opportunities they are interested in, and what they hope to gain from volunteering with your organization

RECRUITMENT TIPS 4 SUCCESS

- **Be Flexible & Diversify**

- Make it easy!
- Offer opportunities outside of the typical 9-5 work schedule
- Provide various opportunities for engagement according to the amount of time volunteers have
- Offer conference calls and webinars for meetings and updates
- Allow remote-work/tele-commuting
- Crowdfunding for events like walk-a-thons, bowl-a-thons, etc. (<https://fundly.com>)
- Think about travel time, parking, traffic, etc.
- Provide family-friendly options

ONE-DAY PROJECT/EVENT VOLUNTEERS AFTER RECRUITMENT – PROVIDE ALL INFORMATION

VOLUNTEER PROJECT INFORMATION FORM

Thank you for volunteering for our upcoming service project. We have a wonderful project planned! Below are the details for the project. Please review the following information and contact us if you have any questions. We look forward to seeing you!

Project: _____ Date: _____
 Location: _____ Time: _____
 Project Leader: _____ Phone: _____
 Day of event phone: _____ E-mail: _____
 Agency we are assisting: _____
 What will we be doing: _____
 What you should wear: _____
 What you should bring: _____
 Project site address: _____
 Directions: _____
 Where you should park: _____

If you have questions prior to the day of the project, please contact the project leader at the phone number or e-mail listed above. Plan to arrive at the project site prior to the start time. Check in at the volunteer registration area, where a team leader will greet you, answer any questions, and get you started.

Timeline of Activity

_____ Volunteer check-in and registration
 _____ Orientation to agency and project
 _____ Serve!
 _____ Clean-up
 _____ Wrap-up, reflection, and evaluation

Call to explain
and follow up
with an email
including this
information.

www.handsonnetwork.org

THE PROCESS: INTERVIEW

- Interview candidates to see if they're a fit for the position
- Candidate Matrix
- What type of interview is most effective for your organization?
 - One-on-one
 - Group
 - Panel
- Who needs to be a part of the interview process?

CANDIDATE MATRIX

Recruitment Sample Short-listing Matrix

| Candidate data from CV or Application form | COMPETENCIES | | | | | | | | | | | Comments | TOTAL | | |
|--|--------------|----------------|-----------|--------------|-----------------------------|---------------------|--|---------------------|-----------------------|------------------|------------------|----------|-------|-----------|--------------|
| | Education | Certifications | Knowledge | Work History | Reason for applying for job | Working with people | Persuading & Communicating Information | Writing & Reporting | Planning & Organising | Staff Motivation | Taking Decisions | | | IT Skills | Presentation |
| Name 1 | | | | | | | | | | | | | | | |
| Name 2 | | | | | | | | | | | | | | | |
| Name 3 | | | | | | | | | | | | | | | |
| Name 4 | | | | | | | | | | | | | | | |
| Name 5 | | | | | | | | | | | | | | | |
| Name 6 | | | | | | | | | | | | | | | |
| Name 7 | | | | | | | | | | | | | | | |

info@assessment4potential.com




THE PROCESS: **SELECT**

- How will you select the best candidate?
- Are you rating based on the candidate matrix?
- How will you notify the selected candidates?
- Provide Volunteer Application Package
 - What documents will volunteers complete?
 - What forms of ID will they provide?
 - Are you doing a background check?
 - Are you checking references?

THE PROCESS: VOLUNTEER ORIENTATION

- When will you host orientations? (Day/Time/Location)
- How often will you host orientations? (Be consistent)
- Orientation Agenda Components
 - Provide An Organization Overview
 - Review Position Description
- Does a walk-thru need to be done?

EXAMPLE YOUTH VOLUNTEER WAIVER AND PUBLICITY RELEASE (ASANTE AFRICA FOUNDATION)

| | | |
|--|--|--|
|  <p style="text-align: center;">Volunteer Waiver and Release Form</p> <p>Volunteer Name _____</p> <p><input type="checkbox"/> Check here if Volunteer is under age 18</p> <p>Contact E-mail (required): _____</p> <p>Parent or Legal Guardian Email (required if Volunteer is under age 18): _____</p> <p>Address: _____</p> <p>Phone: _____</p> <p>Emergency Contact Name: _____</p> <p>Relationship to Participant: _____</p> <p>Phone Number: _____</p> <p><input type="checkbox"/> Check here to receive the Asante Africa Foundation Newsletter</p> <p style="text-align: center;">VOLUNTEERS MUST COMPLETE THE WAIVER AND RELEASE FORM</p> <p style="text-align: center;">PARENT/LEGAL GUARDIAN SIGNATURE IS REQUIRED IF VOLUNTEER IS UNDER AGE 18</p> <p style="font-size: small; text-align: center;">Asante Africa Foundation 1334 Carlen Place Livermore, CA 94550 info@asanteafrica.org Tel: 949-256-5492</p> | <p style="text-align: center;">WAIVER AND RELEASE FORM RELEASE OF LIABILITY</p> <p>In return for being allowed to participate in Asante Africa Foundation volunteer activities and all related activities, including any activities incidental to such participation ("Volunteer Activities"), the undersigned Volunteer or Parent/Legal Guardian of Volunteer (if Volunteer is under age 18 (hereafter referred to using "I," "me" or "my") hereby agrees not to sue the Asante Africa Foundation or its officers, directors, employees, subcontractors, sponsors, agents and affiliates ("the Foundation") from all present and future claims that may be made by me or family, estate, heirs, or assigns in property damage, personal injury, or wrongful death arising as a result of my participation in the Volunteer Activities otherwise "volunteering" to benefit the state and its citizens.</p> <p>I understand and agree that the Foundation is not responsible for any injury or property damage arising out of the Volunteer Activities, even if caused by their ordinary negligence or otherwise.</p> <p>I understand that participation in the Volunteer Activities involves certain risks, including, but not limited to, serious injury and death. I am voluntarily participating in the Volunteer Activities with knowledge of the dangers involved and I agree to accept all risks of participation.</p> <p>I also agree to indemnify and hold harmless the Foundation for all claims arising out of my participation in the Volunteer Activities.</p> <p>I understand that this document is intended to be as broad and inclusive as permitted by the laws of the state in which the Volunteer Activities take place and agree that if any portion of this Agreement is invalid, the remainder will continue in full legal force and effect.</p> <p>I also acknowledge that the Foundation has not arranged and do not carry any insurance of any kind for my benefit or that of Volunteers of Volunteer is under 18, my parents, guardians, trustees, beneficiaries, administrators, successors and assigns. I represent that, to my knowledge, I am in good health and suffer no physical impairment that would or should prevent my participation in Volunteer Activities.</p> <p>I also understand that this document is a contract which grants certain rights to and releases the liability of the Foundation.</p> <p>_____ (Signature of Volunteer) Date _____</p> <p>I am of legal age and am freely signing this agreement. I have read this form and understand that by signing this form, I am giving up legal rights and remedies.</p> <p>_____ (Signature of Parent/Legal Guardian if Volunteer is Under 18) Date _____</p> <p>I am the parent or legal guardian of the Volunteer. I am of legal age and am freely signing this agreement. I have read this form and understand that by signing this form, I am giving up legal rights and remedies.</p> | <p style="text-align: center;">PUBLICITY RELEASE</p> <p>In return for being allowed to participate in Asante Africa Foundation volunteer activities and all related activities, including any activities incidental to such participation ("Volunteer Activities"), the undersigned Volunteer or Parent/Legal Guardian of Volunteer (if Volunteer is under age 18 (hereafter referred to using "I," "me" or "my") hereby grants to the Foundation, and each of its subsidiaries, affiliates, agents, advertising or promotional agencies, and partners, and all such entities' officers, directors, agents, employees, respective successors and assigns (collectively, "Authorized Parties"), the absolute and irrevocable right and permission to use, publish, broadcast and/or copyright the use of Volunteer's name, address, voice, photograph and/or likeness, customer and personal information, in its current form or as retouched, digitized, cropped, altered, distorted or modified in any way, in any and all advertising, promotional, or other materials based upon or derived from the Volunteer Activities in any manner, in any media whatsoever for my and all purposes, including by way of example but without limitation advertising, promoting or publicizing products and services throughout the universe, in perpetuity, in any and all media now known or hereafter devised (including without limitation on the Internet), without additional compensation. I further agree that anything derived there from will be owned solely by the Authorized Parties. I shall not influence the use of any print, negative or other copy thereof by anyone other than the Authorized Parties.</p> <p>I understand that this document is intended to be as broad and inclusive as permitted by the laws of the state in which the Volunteer Activities take place and agree that if any portion of this Agreement is invalid, the remainder will continue in full legal force and effect.</p> <p>_____ (Signature of Volunteer) Date _____</p> <p>I am of legal age and am freely signing this agreement. I have read this form and understand that by signing this form, I am giving up legal rights and remedies.</p> <p>_____ (Signature of Parent/Legal Guardian if Volunteer is Under 18) Date _____</p> <p>I am the parent or legal guardian of the Volunteer. I am of legal age and am freely signing this agreement. 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RISK MANAGEMENT TIPS

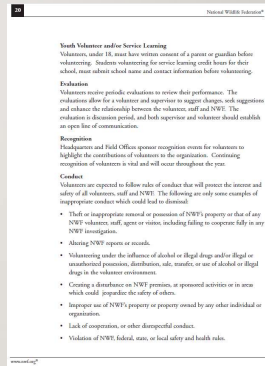
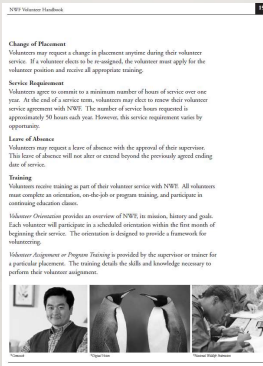
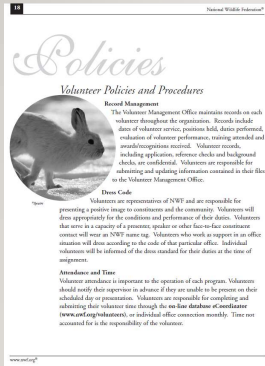
- Here are some best practices for charitable organizations that use volunteers and interns:
 - Document employee, intern, and volunteer policies in separate manuals;
 - Provide intern and volunteer job descriptions in writing;
 - Establish policies about hours of service;
 - Proceed with care when paying volunteers and interns;
 - Establish a grievance procedure for volunteers and interns to address any issues that may arise; and
 - Verify whether volunteers and interns are covered by the organization's worker's compensation or other insurance.

CA Attorney General's Guide for Charities

THE PROCESS: TRAIN

- When will you host trainings?
- How long will the training be?
- What will the training involve?
- Who needs to be included in the training?
- Do you have a volunteer handbook?

NATIONAL WILDLIFE FOUNDATION VOLUNTEER POLICIES AND PROCEDURES EXAMPLE



THE PROCESS: MONITOR PERFORMANCE

- How will you monitor the effectiveness of each volunteer?
- How often will you discuss performance?
- What policies do you have surrounding performance?

THE PROCESS: EVALUATE

- How will you measure the effectiveness of each volunteer?
 - Create an Evaluation System
 - Include volunteer surveys
 - Capture their overall experience and suggestions
- One Day Volunteers
 - Some large events skip the evaluation part of the process

EXAMPLE

VOLUNTEER PERFORMANCE EVALUATION

Name: _____ Date: _____

Supervisor: _____

Volunteer Vision Statement: We celebrate the unique contributions of our volunteers who join us as steadfast ambassadors of XYZ Organization and leaders in providing services.

The purpose of this evaluation is to help our volunteers work to their greatest potential and to help XYZ better involve volunteers in participating in their success at XYZ.

Please assess the above named volunteer by considering the following competencies and key behaviors. [This statement can be directed toward either staff or a volunteer who does a self-assessment].

Please rate each item as Excellent, Good, Fair, or Poor, and feel free to include your comments in the appropriate section.

| | EXCELLENT | GOOD | FAIR | POOR | COMMENTS |
|--|-----------|------|------|------|----------|
| 1. Adheres to XYZ's policies | | | | | |
| 2. Adheres to XYZ's policies | | | | | |
| 3. Desires to grow and learn | | | | | |
| 4. Displays energy | | | | | |
| 5. Displays appropriate enthusiasm and/or attitude | | | | | |
| 6. Follows instructions | | | | | |
| 7. Gives and takes feedback well | | | | | |
| 8. Handles difficult situations effectively and appropriately | | | | | |
| 9. Handles difficult people (clients, volunteers, staff) effectively and appropriately | | | | | |
| 10. Leads when appropriate | | | | | |
| 11. Conducts him/herself in professional manner at all times | | | | | |
| 12. Manages time efficiently | | | | | |
| 13. Quality of work performed | | | | | |
| 14. Punctuality/attendance | | | | | |
| 15. Respectfulness | | | | | |
| 16. Respects confidentiality | | | | | |
| 17. Responsiveness | | | | | |
| 18. Self-motivated | | | | | |
| 19. Shares XYZ's mission | | | | | |
| 20. Concern for participants (clients, visitors, customers, etc.) | | | | | |
| 21. Wiling to help where needed | | | | | |

Thank you for completing this evaluation. Please return it to XXXXX by XXXX date. The results will be shared with the volunteer and staff partners.

THE PROCESS: **EVALUATE**

- **You can evaluate:**
 - Volunteer acquisition
 - Volunteer retention
 - How often and through which channels you've contacted volunteers
 - Which communication channels volunteers respond most warmly to
 - Which volunteer opportunities generate the highest engagement levels

THE PROCESS: **RETAIN**

- How will you keep your best volunteers coming back?
 - Acknowledge, Acknowledge, Acknowledge!
 - Create a Rewards System
 - Consistent Communication - Make sure they know what is going on in the organization

TIPS AND TOOLS FOR RECOGNITION

- Use e-mail to send thank you letters/messages.
- Send postcards or thank you cards to volunteers after they attend a project
- Send a birthday card
- Submit pictures of volunteers to be in your organization's newsletter
- Post pictures of volunteers on a bulletin board at your organization
- Provide organizational goodies – hats, shirts, pins, magnets, water bottles, etc.
- Have them join you for coffee or lunch

www.handsonnetwork.org

FROM RETENTION TO SUSTAINABILITY

- Sustainability, unlike retention, *is the ability to maintain a healthy balance while avoiding depletion.*
 - Sustainability, as it is being applied to agriculture, economics and ecosystems implementation implies that there is a larger network to be considered.
 - Partnering with other local organizations to exchange ideas, plan collaborative activities, and share resources & volunteers
- Meridian Swift, Volunteermatch.org

FROM RETENTION TO SUSTAINABILITY

| Volunteer Retention | Volunteer Sustainability |
|--|--|
| Make the volunteers feel welcomed- balloons, cake, signs that say "we need (love) you" | Connect the volunteers to the mission, and to volunteering as crucial work |
| Give lots of thank you's, cute gifts, cards, annual luncheons, symbolic awards | Show impact of volunteer work in meaningful stats, stories, testimonials |
| Be careful to tailor jobs to fit volunteers' schedules, skill levels and availability | Create meaningful opportunities that spark volunteer involvement |
| Schedule regular volunteer meetings to inform volunteers of org policies, changes | Communicate via multiple avenues and enlist volunteer voices |
| Fill volunteer tasks and follow up to make sure the volunteer is satisfied and has resources | Involve volunteers in defining tasks, creating new roles |
| Educate staff on working with volunteers | Free volunteers to fully engage |
| Have other tasks available if volunteer is on waiting list | Share volunteers* |

FROM RETENTION TO SUSTAINABILITY

- Share background checks if you are able, in order to cut costs
- Pair up with other organizations to conduct a visible volunteer project and involve local media to cover the event
- Create volunteer educational conferences with other volunteer managers to benefit all volunteers in area. Share space, costs of snacks, or printed materials creating more bang for the buck
- Share cost of a national speaker with other volunteer programs and invite all volunteers in your area.
- Create a summer circle of volunteering for out-of-school students so they can sample the various opportunities in your area and participate in a well-rounded service learning experience

THE PROCESS CYCLE



3. CONSISTENCY IS KEY

- Once you create your volunteer process – Stick With It!

4. COMMUNICATION IS KING

- How Does Your Organization Communicate Consistently?
 - Phone Calls
 - Emails
 - Social Media
 - Incorporating Volunteers Into Organization News
- Focus on relationship building!

5. GROWTH & PROFESSIONAL DEVELOPMENT OPPORTUNITIES

- Is Your Organization Providing Growth & Professional Development Opportunities For Volunteers?
 - Do Volunteers Have A Fulfilling Role?
 - Are There Staff Opportunities For Those Who Want To Transition?
 - Are There Opportunities For Dual Roles?

RESOURCES

ON-LINE RESOURCES

- Energize Inc. (www.energizeinc.com)
- ePhilanthropyFoundation.org (www.ePhilanthropyFoundation.org)
- e-volunteerism.com (www.e-volunteerism.com)
- Hands On Network (www.handsonnetwork.org)
- Idealist.org: Action Without Borders (www.idealist.org)
- Independent Sector (www.independentsector.org)
- Attorney General's Guide for Charities (www.oag.ca.gov)

ON-LINE RESOURCES

- National & Global Youth Service Day (<http://www.ysa.org/nysd/resource/planning.cfm>)
- National Service Resource Center (www.nationalserviceresources.org)
- Network for Good (www.networkforgood.org)
- Service Leader (www.serviceleader.org)
- ServeNet (www.servenet.org)
- Students in Service to America Guidebook
(<http://www.studentsinservicetoamerica.org/guidebook/index.html>)
- National Council of Nonprofits (www.councilofnonprofits.org)

TIPS AND TOOLS FOR RECOGNITION

- Nominate a volunteer Star of the Month – award them a certificate, letter, or small gift.
- Sponsor happy hours and social events. Encourage volunteers to meet each other.
- Recognize volunteers on local podcast, radio or television stations and events.
- Invite volunteers to serve as project leaders or committee members.
- Give gift certificates to museums, movies, restaurants, etc. Solicit your community for donations!
- Nominate volunteers for local/national awards such as the Presidential Service Awards.

www.handsonnetwork.org

TIPS AND TOOLS FOR RECOGNITION

- Write articles about them in newsletters or newspapers.
- Write a letter to their employer highlighting the accomplishments of the volunteer. Be sure to find out of the volunteer would appreciate this before writing the letter!
- Celebrate major accomplishments.
- Recognize anniversaries with your organization.
- Have them attend a training, workshop, seminar, etc. at the expense of your organization.
- Give them additional responsibilities.
- Create a photo collage or slide show of volunteer activities.

www.handsonnetwork.org

TIPS AND TOOLS FOR RECOGNITION

- Hold annual recognition events: a dinner, a breakfast, an awards ceremony/celebration, a picnic/potluck, theme party, etc.
- Recognize long-term volunteers with Service Awards: a plaque, trophy, certificate, etc.
- Give additional responsibilities and a new title.
- Put up a banner celebrating major accomplishments.
- Enlist them in training staff and other volunteers.
- Involve them in the annual planning process.
- Make a donation to the organization of their choice in their name.
- Organize an outing at a zoo, amusement park, sporting event, etc., where volunteers get in for free.

www.handsonnetwork.org