

United Way Volunteer Center

VOLUNTEER ENGAGEMENT CHECKLIST

Here are steps you can take to help ensure a positive volunteer experience --
for volunteers AND for you!

BEFORE YOU RECRUIT A VOLUNTEER:

Be clear about ***what you want the volunteer(s) to do.***

- ◆ What the job responsibilities are
- ◆ Why the work needs to be done
- ◆ How it fits into the “bigger picture”
- ◆ How much time it will take
- ◆ What the expectations are

Identify ***who will train/orient and supervise/support the volunteer.***

- ◆ Do they know that this is their responsibility?
 - * If they do not agree with this arrangement, how can this be resolved?
 - * Do they have the volunteer management skills they need?

Write a clear ***job description*** which includes:

- ◆ time commitment
- ◆ specific responsibilities
- ◆ training provided
- ◆ supervisor
- ◆ benefits

Write down ***relevant policies/procedures*** that volunteers need to know regarding your agency and their volunteer work.

Decide the ***type of person you want for the job.***

- ◆ Do “deliberate recruitment.” This means that you need to find the *right person for the right job*. Not everyone can do (wants to do or should do) every volunteer job.

This is an important step. By not having a good match, a program, committee or project can suffer. *Also*, if the volunteer does not have a good experience, this could affect their feelings about your agency and/or their desire to continue their volunteer involvement with you.

Determine **where** you can find this type of person.

- ◆ How can you reach them? (in-person, articles, PSA, presentation...)
- ◆ If it is “in-person,” who should ask them? or make the presentation? **Many times it’s best if a volunteer does this.**

Decide if **background, reference and/or health checks** will be necessary for this job. (Examples: criminal records, driving records, physical, immunizations)

- ◆ If so, do them for everyone you consider for the position. Be consistent, do not discriminate.

Have a **place** for the volunteer to work. Provide a mailbox or folder for each volunteer and a safe place for personal belongings.

- ◆ This is most applicable to in-house volunteers, but it is also considerate to have a place for other volunteers if they need to do some work in your office. You don’t want volunteers to feel “in the way”.

WHEN SOMEONE EXPRESSES AN INTEREST:

Meet with them to:

- ◆ Find out what they are looking for in a volunteer job.
- ◆ Explain what you are looking for, what the job entails, review job description

Mutually decide if the “fit” is right.

- ◆ It’s just like hiring someone for a paid position. You need the right match between person and job. (Don’t follow the “any warm body” philosophy.)
- ◆ Interview the person (and let them interview you). Interview questions include:
 - * Their interests, desires & expectations from volunteering
 - * How much time they want to give
 - * What their motivations are for volunteering
- ◆ Tell them what your expectations are, what the time commitment is, etc.
- ◆ Only ask them questions relevant to the position in which they are interested. Some of your questions will change for different positions
- ◆ If the fit *isn’t* right, discuss if there is something else they might want to do at your agency that would be a better match. Have other job descriptions available.

WHEN THE MATCH IS MADE:

Provide the volunteer with appropriate **orientation and training**. This should include:

- ◆ Key written materials
- ◆ Introductions to other staff and volunteers (especially those in your department, or with whom the volunteer will work)
- ◆ Specific instruction on what their job does and does *not* entail
- ◆ Training on any office equipment they will be using (copy machine, phone system, computer, etc.)
- ◆ Emergency procedures for your office
- ◆ Explanation of how the volunteer’s work fits into the big picture, your agency’s mission, and why their work is important

Start a **file** (paper or electronic) for each volunteer in which you can keep:

- ◆ their application form
- ◆ emergency phone numbers
- ◆ a record on their starting (anniversary) date, birthday, any special needs they have, record of trainings/in-services they attend

Make sure you know the volunteer's **work is appropriate**: Are they getting the job done? Do they need additional training? (Troubleshooting)

Have a "**support system**" for volunteers. Keep them informed of accomplishments, new developments, policies, etc.

- ◆ in-service trainings
- ◆ staff meetings
- ◆ newsletters

At the end of six months (or so), meet with the volunteer to talk about:

- ◆ How they feel about the job
- ◆ Do they want to continue?
- ◆ Are there other skills they want to be utilizing?
- ◆ How you feel they are doing
- ◆ Do any changes need to be made? If so, what? by whom?

TO KEEP VOLUNTEERS MOTIVATED:

Here are several simple (and inexpensive) ways to keep volunteers interested and motivated in their work:

- ◆ **Stay in touch**: Check-in with them to see how they are feeling and how the job is going
- ◆ Send them **birthday and anniversary cards**. (people love this!)
- ◆ Send them a **hand-written note** to say "Thanks" or "A job well done" when they have done something special
- ◆ Give them **feedback** on their work
- ◆ Provide **opportunities for advancement** such as having experienced volunteers help train new volunteers, give presentations, speak to groups, help with volunteer recruitment – volunteer can and should be your best ambassadors!
- ◆ **Recognize** volunteers in your agency *newsletter*, Facebook page, tweet about them, invite them to a *board meeting* or at your *annual meeting*
- ◆ Give volunteers **certificates** or **pins** for years of service
- ◆ Find out what type of recognition they are and are *not* comfortable with

WHEN IT'S TIME TO MOVE ON:

Put **closure** to their work.

See if there are **any other areas** of your agency in which they would like to be involved.

- ◆ Just because someone is through with one volunteer position, that doesn't mean they are through with their interest in your agency. It's important to offer the volunteer other opportunities in your agency. This:
 - * provides the volunteer with **recognition** for the work they have done
 - * keeps people **involved** who have knowledge about what you do. Their knowledge and experience with your agency will be an asset as they continue their involvement with your organization.
 - * helps the volunteer with personal and professional **development**
 - * lets you to **keep working with great people!**

LETTING A VOLUNTEER GO:

This is always a difficult situation, but sometimes unavoidable. However, there are several things you should do before it is necessary to fire a volunteer such as:

- ◆ **be clear from the beginning** as to what the volunteer's responsibilities are and what they are *not*
- ◆ have **policies/procedures** on how you deal with inappropriate behavior
- ◆ **be consistent** in how you handle problem situations and deal with problems ASAP
- ◆ **document** inappropriate behavior and how it was dealt with
- ◆ is there another job that would be **a better match** for the person?

If it becomes necessary to fire the volunteer:

- ◆ **meet** with them **privately**
- ◆ mention the **strengths** that they have
- ◆ clearly **explain why** this step is necessary
- ◆ **be concise**, don't belabor your points
- ◆ **recognize the difficulty** of the situation

SUMMARY:

Working with volunteers parallels working with paid staff in many ways. Solid personnel management skills are needed for supervisors of volunteers and consistent and fair policies/procedures are needed for both paid and unpaid (i.e. volunteer) staff.

Volunteers deserve the same respect, attention, value, time, training and recognition as paid staff. To successfully involve and engage volunteers in your organization, there needs to be an organizational commitment to, and agreement on, the work that they will be doing.

By following these practices, your organization can accomplish much more, you will have interested, active and motivated people working for your agency, your volunteers will help spread the word about what a great place your agency is and they will be your ambassadors in the community.

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