



*Everyone Ready*®

An online volunteer management  
staff development plan

FROM ENERGIZE

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## Online Seminar Trainer's Handouts

### Building the Foundation for Volunteer Involvement

Trainer: Susan J. Ellis

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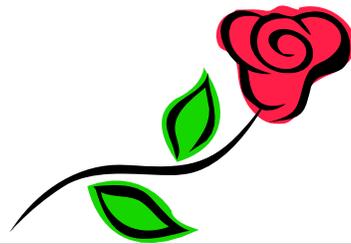
# What's in a Name?



## What's in a name?

### Volunteer Voluntary

- ▶ Unpaid Staff
- ▶ Intern
- ▶ Board Member
- ▶ Trustee
- ▶ Auxilian/Friend



### Volunteerism Voluntarism

- ▶ Active Citizen
- ▶ Member
- ▶ Good Samaritan
- ▶ Donor
- ▶ Community Resource

## Social Change

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>▶ Activism</li> <li>▶ Community Involvement</li> <li>▶ Historical Movements</li> </ul> | <ul style="list-style-type: none"> <li>▶ Neighborhood Actions</li> <li>▶ Mutual Aid</li> <li>▶ Community Organizing</li> </ul> |
|---|--|

## Students

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li>▶ Service-Learning (Curriculum-based)</li> <li>▶ Experiential Learning</li> <li>▶ Community Service</li> <li>▶ Internship</li> </ul> | <ul style="list-style-type: none"> <li>▶ Graduation or Course Requirement</li> <li>▶ Extra-Curricular Activity</li> <li>▶ Voluntary</li> </ul> |
|---|--|

## Business World/the Professions

- ▶ Corporate Social Responsibility
- ▶ *Pro Bono Publico* Work
- ▶ Donated Professional Services
- ▶ Work-Release Time

## Justice Field

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>▶ Court-Ordered Community Service</li> <li>▶ Alternative Sentencing</li> <li>▶ Restorative Justice</li> </ul> | <ul style="list-style-type: none"> <li>▶ In lieu of fine or jail</li> <li>▶ In addition to time served</li> <li>▶ In addition to probation or parole</li> </ul> |
|--|---|

## Faith Communities

- |  |   |
|--|---|
| <ul style="list-style-type: none"> <li>▶ Lay Ministry</li> <li>▶ Social Concerns</li> <li>▶ Tzedakah, Mitzvah</li> </ul> | <ul style="list-style-type: none"> <li>▶ Zakat (Sadaqa)</li> <li>▶ Charity</li> </ul> |
|--|---|

## Mutuality

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>▶ Self-Help</li> <li>▶ Client-Participant</li> <li>▶ Stakeholder</li> </ul> | <ul style="list-style-type: none"> <li>▶ Neighborliness</li> <li>▶ Civic Duty</li> <li>▶ Belonging, Taking Part</li> </ul> |
|--|--|

## Newly-Coined Terms

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>▶ Civic Engagement</li> <li>▶ Civil Society</li> <li>▶ Social Entrepreneurship</li> </ul> | <ul style="list-style-type: none"> <li>▶ Community Assets</li> <li>▶ Voluntourist</li> <li>▶ Skill-anthropist</li> </ul> |
|--|--|

## Other Programs

- ▶ Welfare to Work Options
- ▶ Service Dollar/Time Banking
- ▶ National Service

## And some think...

- ▶ Slave
- ▶ Relative
- ▶ Sucker

# Dimensions of Volunteering and Service



Formal	Community-Based	Special	Infrastructure
<p><u>Community Service</u></p> <p><u>Agency-related Volunteer Programs</u></p> <p><u>Boards of Directors or Trustees, &amp; Advisory Councils</u></p> <p><u>Corporate Social Responsibility &amp; Employee Volunteer Programs</u></p> <p><u>Pro Bono Publico Work/ Donated Professional Services</u></p> <p><u>Trade and Professional Associations, Labor Unions</u></p>	<p><u>Community Service</u></p> <p><u>Auxiliaries, Friends &amp; Alumni Groups</u></p> <p><u>All-volunteer Membership Associations</u></p> <p><u>Civic Engagement &amp; Civil Society</u></p> <p><u>Social Entrepreneurship</u></p> <p><u>Grassroots Activism &amp; Neighborhood Organizing</u></p> <p><u>Co-operatives</u></p>	<p><u>Service-learning/Internships</u></p> <p><u>Faith-based Service, Lay Ministry</u></p> <p><u>National Service and Full-time Stipended Service</u></p> <p><u>Mandated (but Unpaid) Service</u></p> <p><u>Self-help Groups</u></p>	<p><u>Volunteer Centers, National Resource Organizations, State/Provincial Offices, and other volunteer-referring organizations or sites</u></p> <p><u>Professional Associations of Volunteer Program Managers</u></p> <p><u>Consultants and Trainers in Volunteerism</u></p> <p><u>Academics and Researchers</u></p>

For much more detail, go to the Energize Web site at:  
<http://www.energizeinc.com/volunteer-map.html>

# First Choice Reasons to Involve Volunteers – Beyond “Saving Money”



## Volunteers...

- ▶ Have perceived credibility because they choose to be advocates – it’s not their “job.”
- ▶ Mean something different to the recipient of service than a paid worker (you don’t pay for friendship).
- ▶ Are insider/outsideers, bringing community perspective.
- ▶ Add diversity (of all types), expressly different from paid staff.
- ▶ Can be objective policy makers without financial vested interest.
- ▶ Have the “luxury of focus” to concentrate on one client, task, or issue.
- ▶ Demonstrate or acquire ownership of the issue through involvement.
- ▶ Are at liberty to criticize because their livelihood isn’t at stake.
- ▶ Are still “private citizens,” free to contact legislators or the media.
- ▶ Can cut through red tape and artificial jurisdictional barriers.
- ▶ Can experiment with new ideas and service approaches, testing what might later be funded.
- ▶ Bring *more* to the organization: time, talents, hands, perspectives.



***NEVER* say:  
"Volunteers *save us* money."**

This is usually untrue! Instead, say:

**"Volunteers allow us to spend every dollar we have—  
and then to do more."**

—or—

**"Volunteers *extend* our budget."**

# Sample Statements of Philosophy



*The following is the example of a Statement of Philosophy from From the Top Down: The Executive Role in Volunteer Program Success, 3<sup>rd</sup> ed., by Susan J. Ellis, © 2010, Energize, Inc.*

Our agency encourages the teamwork of employees and volunteers so that we can offer our consumers the best services possible. Volunteers contribute their unique talents, skills, and knowledge of our community to provide personalized attention to clients, enable the paid staff to concentrate on the work for which they were trained, and educate the public about our organization and its cause.

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## Boulder County Government (Colorado)

*The following is the actual mission statement approved and disseminated by the officials of Boulder County, CO*

### **Vision**

Boulder County values and provides opportunities for active participation of its citizens in voluntary partnerships that enhance and enrich government services and the quality of life in the community.

### **Philosophy**

Boulder County government is a joint venture between its citizens and the individuals and departments that are charged with the responsibility of carrying out the functions of local government. To assure that citizens have opportunities for meaningful and effective engagement in local government operations, professional standards in volunteer management are accepted as the guidelines for best practices.

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## Policy on Volunteering of the National Trust (UK)

Adapted in “A Model Policy on Volunteering” by WCVA, the Volunteer Development Agency in Wales

[http://www.wcva.org.uk/all/dsp\\_Pub\\_infosheet\\_detail.cfm?Publicationid=38&display\\_sitedeptid=6](http://www.wcva.org.uk/all/dsp_Pub_infosheet_detail.cfm?Publicationid=38&display_sitedeptid=6)

- 2.1 Volunteers are an established and integral part of the work of (**name of organisation**). Inviting people from the community into our organisation ensures that we have the community’s support and input into our activities. Volunteering provides benefits which are above and beyond those supplied by statutory services, and which improve the quality of peoples’ lives. Without the involvement of volunteers in this organisation we would not be able to provide the range of services and activities.

# Questions to Consider...and Answer about Volunteer Engagement



- **Why do we want volunteers?**
- **What's the connection between volunteer engagement and other community outreach?**
- **How do volunteers fit into our contributions "mix"?**
- **What kinds of volunteers do we want?**
- **What are our expectations of volunteer accomplishments?**
- **What work will volunteers do and not do, and why?**
- **Who will coordinate volunteer efforts?**
- **What are resources will we allocate to support volunteers?**
- **Is staff willing and able to work with volunteers?**
- **Have we considered possible problem areas and how we might react if problems occur?**
- **Is planning for volunteers integrated with agency planning?**

# The 12 Elements of a Successful Volunteer Program



## **Element #1: Planning and Resources**

Planning is the key to success for all organizational projects, and volunteer program development is no exception. Planning for volunteers, who will be your organization's unpaid personnel, includes a variety of decisions about: climate/readiness for volunteers; goals and objectives; budget and resources; staff preparation; and an implementation plan.

## **Element #2: Staffing/Coordination**

By definition, volunteers are part-time staff with widely varying schedules. Add to this the diversity and backgrounds of the people who volunteer, and the resulting work force is a logistical challenge. A volunteer program must have a clearly-designated coordinator to handle all the activities outlined in these thirteen management elements.

## **Element #3: Volunteer Work Design**

Developing volunteer assignments that are meaningful to the organization and attractive to prospective volunteers requires both planning and vision. It means analyzing what needs to be done (whether to assist staff or to provide a service directly to clients) and then creatively designing tasks doable in short bursts of time, by a variety of people with different skills. Expectations and qualifications for such volunteer positions need to be defined in writing.

## **Element #4: Recruitment**

Recruitment is the process of encouraging people to give their time and energy to an organization as volunteers. Successful recruitment requires the support of the entire organization and is closely tied to overall public relations and marketing efforts.

## **Element #5: Interviewing and Screening**

Effective initial interviewing of prospective volunteers prevents many types of supervision and management problems. It also allows candidates to be matched with the most appropriate and appealing assignment for them.

## **Element #6: Orientation and Training**

*Orientation* is the overview of the total organization necessary for every volunteer, regardless of specific assignment. It places the work in context and allows for consistent introduction of policies, procedures, rights and responsibilities.

*Training* of volunteers should be customized to the requirements of each position description and the background each volunteer brings to the organization. There is initial, start-up training, plus the need for ongoing, in-service training. Much training is dependent upon giving clear instructions and is integrated into supervision.

*(continued next page)*

# 12 Elements of Successful Volunteer Programs

*(continued)*

## **Element #7: Volunteer/Employee Relationships**

The interrelationship of volunteers and employees can be the single biggest obstacle to effective volunteer involvement, unless steps are taken to encourage teamwork. This requires training, evaluation and administrative attention. It is also important to pay attention to the relationships between long-time volunteers and newcomers.

## **Element #8: Supervision**

As with employees, volunteers need support from those in a position to see the total picture and who know what work needs to be done. A key aspect of the supervision of volunteers is access to someone in charge during the time the volunteer is on duty. Not all volunteers are supervised. Some require liaison or reporting contact.

## **Element #9: Recognition**

Recognition is a form of compensation for volunteer efforts. It includes thanking volunteers for their efforts and welcoming volunteers' input. An organization can provide annual formal recognition through certificates and dinners, but equally important are daily support and informal expressions of appreciation.

## **Element #10: Recordkeeping and Reporting**

If volunteers are important to the work of the organization, it is important to know what volunteers are doing. Documenting volunteer work assists in recruitment, training, recognition and even fundraising. Recordkeeping is also necessary for insurance coverage and to support the income-tax deduction claims of volunteers. Once records are kept, they are of little meaning if they are not reported. Reports of the cumulative achievements of volunteers should be shared with volunteers, as well as with administration, other staff and funding sources.

## **Element #11: Evaluation**

Because volunteer time is too valuable to waste, it is imperative to evaluate the impact of volunteer services regularly and to discover whether those services are still the most meaningful ones to deliver. Along with program evaluation, it also is helpful to conduct individual performance reviews with volunteers. This practice maintains standards for the program and also recognizes each volunteer.

## **Element #12: Volunteer Input**

Some organizations want help from volunteers, but not input. Volunteers are in a position to observe an organization and can take more risks in criticizing. They also are effective community advocates when they observe things going well. It is important to create a channel for volunteer comments. Also, having the opportunity to voice opinions and make suggestions encourages greater participation in all aspects of the volunteer program.

## Resources for Further Learning



The Energize, Inc. Web site ([www.energizeinc.com](http://www.energizeinc.com)) is the largest in the world focused on the leadership of volunteer programs.

You'll quickly see that we bring a wealth of materials to your fingertips, whether for a beginning or a veteran in the field. Specifically, spend some time in:

### **The Volunteer Management Resource Library:**

<http://www.energizeinc.com/art.html>

Topics particularly relevant are:

- Definitions of Volunteer ([www.energizeinc.com/art/defnew.html](http://www.energizeinc.com/art/defnew.html))
- Philosophy ([www.energizeinc.com/art/subj/history.html](http://www.energizeinc.com/art/subj/history.html))
- Profession/Field of Volunteer Management ([www.energizeinc.com/art/subj/field.htm](http://www.energizeinc.com/art/subj/field.htm))
- Role of Director of Volunteers ([www.energizeinc.com/art/subj/role.html](http://www.energizeinc.com/art/subj/role.html))
- Executive Director, Role of ([www.energizeinc.com/art/subj/exec.html](http://www.energizeinc.com/art/subj/exec.html))
- Policy Development ([www.energizeinc.com/art/subj/pol.html](http://www.energizeinc.com/art/subj/pol.html))

You'll also want to see Major Web Sources of Information on Volunteer Management ([www.energizeinc.com/art/web.html](http://www.energizeinc.com/art/web.html)).

### **The Energize Online Bookstore** (*where you can use your Everyone Ready discount which can be found on your Main Page*)

To help newcomers to the field, we have compiled a "Starter Set" page highlighting basic books on volunteer management:

<http://www.energizeinc.com/store/To-Sta>

### **"Dimensions of Volunteering and Service"**

(<http://www.energizeinc.com/volunteer-map.html>) and scroll the entire page to learn about all the various streams of service included under the umbrella term of "volunteer."

### In the two areas called **Sources for Information and Exchange**

(<http://www.energizeinc.com/prof-2.html>) and **Events, Conferences and**

**Awards** (<http://www.energizeinc.com/prof-1.html>)

many resources are listed for further interaction with other volunteer management practitioners: professional associations, volunteer centers, print and online publications, conferences and workshops around the world, and more.

The *e-Volunteerism online journal*, a component of the *Everyone Ready* resources, offers you the full archive of journal articles since 2000.

Remember that you have to enter *e-Volunteerism* from the *Everyone Ready* Main Page in order to access the full text of each article.

## About the Trainer



### Susan J. Ellis

Susan Ellis is President of Energize, Inc., an international training, consulting, and publishing firm that specializes in volunteerism. She founded the Philadelphia-based company in 1977 and since that time has assisted clients throughout North America, Europe, Asia, Latin America, Israel and Australasia to create or strengthen their volunteer corps.

Susan is the author or co-author of twelve books, including *From the Top Down: The Executive Role in Successful Volunteer Involvement* (3<sup>rd</sup> edition, 2010), *The Volunteer Recruitment Book*, and *By the People: A History of Americans as Volunteers*. She has written more than 120 articles on volunteer management for dozens of publications and writes the national bi-monthly column, "On Volunteers," for *The NonProfit Times* (since 1990).

Energize's innovative Web site has won international recognition as a premier resource for volunteer program leaders: [www.energizeinc.com](http://www.energizeinc.com). In 2000, she and Steve McCurley launched the field's first online journal, *e-Volunteerism: The Electronic Journal of the Volunteer Community* ([www.e-volunteerism.com](http://www.e-volunteerism.com)), for which she continues to serve as editor. Energize also offers *Everyone Ready*®, online volunteer management training for organizations and individuals ([www.energizeinc.com/everyoneready](http://www.energizeinc.com/everyoneready)), for which Susan serves as the dean of faculty.

Susan is an active volunteer in a variety of volunteerism associations and community groups.