

# Effective Use of Volunteers

Making the most of a valuable asset

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# Volunteer Risk Management

There is liability involved in using volunteers:

1. Liability of the volunteer
2. Liability of the agency to the volunteer
3. Liability of the agency because of the actions of the volunteer

# Certified Volunteer Administrator

The Council for Certification in Volunteer Administration advances the profession and practice of volunteer resource management by:

- articulating core competencies for the profession of volunteer administration
- certifying individuals who demonstrate knowledge and competence in the leadership of volunteers
- advancing standards of ethical practice
- promoting professional development and education

The CVA is the only international professional certification in the field of volunteer resources management.

[www.cvacert.org](http://www.cvacert.org)

# Reducing risk when dealing with volunteers

The four steps:

1. Identify risks for each volunteer position
2. Screen volunteers based on the position risks
3. Train staff and volunteers
4. Review and update programs

# Part 1 - The Risks

# Identify the Risks

1. Evaluate your own programs to identify any potential risks.
2. What could go wrong? What is the worst case scenario?
3. How can we avoid these problems?
4. What will we do if these things happen?
5. How will we pay for it?
6. Develop appropriate procedures and policies to address these issues.
7. Have written volunteer job descriptions - not generic, but duty specific.

## Screen your volunteers

That's right – interview them! Not only will this offer some measurement of protection against liability to your agency, but it will increase the efficiency of your volunteer program by better matching skills, knowledge and experience with needs and duties.

- be clear about your needs – Do you need this volunteer
  - Just because someone comes in to offer their skills or services does NOT mean you have to put them to work. Remember that this will draw management attention from other areas which may be more important to mission
- make sure the skills are there
  - If you would ask a person applying for a paid position to demonstrate competency, you can ask a volunteer as well
- get a clear commitment
  - contracts
- think sustainability
  - If this volunteer leaves, will we know how to continue to program or how to maintain the website? Will they leave instructions?

## Review and evaluate your program

Continually update your programs, training and policies to take into consideration new duties, needs, and experiences.

Review and evaluate your volunteers' performance as well. This can ensure that the volunteer is performing job duties effectively and efficiently as well as reduce risks.

If a volunteer leaves, conduct an Exit Interview just as you would for a paid staff member.

Sample volunteer review form  
<http://www.casenet.org/program-management/volunteer-manage/casaeval.htm>

Exit Interview  
<http://www.charityvillage.com/cv/research/vol41.html>

## Screening for Risk

Will your volunteers be performing duties that specifically open the door for liability?

Will they be working with children?  
 Your screening should include a criminal background check.

Will they be driving a company vehicle?  
 Your screening should involve checking the driver's record.

Will they be using any sharp instruments or hazardous materials?  
 Safety training should be given and protective equipment provided. Does state law require volunteer to be 18 if using sharp instruments or hazardous materials?

AGAIN, screen, train, supervise, provide job descriptions and appropriate policies and procedures for any of the above.

## Part 2 - The Trends

## Orient, Train and Supervise Volunteers

Both paid staff AND volunteers need to know the duties, rules, procedures, rules and policies BEFORE you put the volunteer to work. This will avoid miscommunication and reduce risk.

Staff should also be trained in risk preparedness.

A Legal Handbook for Nonprofit Corporation Volunteers  
<http://www.iciclesoftware.com/vlh7>

## Calls for new Staff Roles

The person responsible for Volunteer Engagement should definitely have the ear of, if not be, a Senior Manager. It would even make sense for this person to be an HR Professional. The role includes that of:

- Cultivator
- Facilitator
- Negotiator
- Co-creator
- Co-producer

### Staff must steward the volunteer

You will need to:

- provide professional skills
- share wisdom and advice in a specific content area
- provide support
- impart knowledge and understand that adults learn differently from children
- be a leader to help other staff become stewards

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### Why do people volunteer?

1. Altruism: to contribute to the general good, to give back to the community, to help others, to make a difference
2. Stakeholder relationship: a consumer of your programs and services, or related to/friends of a consumer
3. Lifestyle enhancement: want to learn something new; a diversion from routine; want to feel productive/useful; want to feel good about themselves
4. Resume builder, to gain status/recognition, to gain leadership skills
5. To keep busy, to meet new people, to learn more about community
6. To be a watchdog, be an "insider"
7. Have skills, expertise to offer
8. Guilt, to repay a debt

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### Part 3 – Volunteer Motivation and Desired Characteristics

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### Desired Characteristics in a Volunteer

- Interest in your mission
- Genuine, sincere, cooperative
- Have time to give
- Loyal, dependable
- Committed, consistent
- Have expertise to share
- Have flexibility of schedule
- Optimistic
- Sense of humor
- Empathy, understanding
- Non-judgmental
- Non-egocentric
- Able to follow direction
- Curious, creative

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### Why use volunteers?

Volunteers:

- allow a non-profit to fulfill its missions while limiting costs for paid staff
- free paid staff up to provide other programs and services
- provide a link to the community
- infuse new and/or different points of view
- bring additional knowledge, skills, and abilities
- can offer a fresh perspective in identifying solutions to issues
- extend the reach of the organization
- provide an additional voice in the community

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### Disadvantages of volunteers

- Organization has lack of control over reliability
- What if volunteer strays from defined role or responsibility
- Even volunteers need supervision
- There may be a negative impact for paid staff
- Difficulty in attracting sufficient numbers of qualified volunteers
- Retention
- Avoiding burnout
- Difficulty in maintaining a volunteer management structure

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## What is the #1 reason people do not volunteer?

Because no one asked them to!!!

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## Are you really ready for volunteers?

Are you generational savvy? Each generation requires communication in a different way. Each has different motivation when it comes to being a volunteer. You must be aware of the differences and how to deal with them.

It is important to know and understand the needs of your organization and your environment.

Do you have mentors available?

Can you use volunteers in different outside-of-the-box ways? As a substitute (on demand), seasonally, for a specific skill set, or just as a full-time volunteer in a specific role?

You need to do a Needs Assessment and an Assessment of Volunteer Engagement.

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## Part 4 – The Volunteer Program

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## Turn offs

There could be barriers within your organization that are keeping you from getting those great volunteers.

"We have always done it this way."

Lack of innovation

Lack of use of appropriate technology

Staff resistance

Lack of interest in volunteer's offer of services

*"The most important things to remember is this: To be ready at any moment to give up what you are for what you might become."*

– *W.E.B. DuBois* (February 23, 1868 – August 27, 1963; an intellectual leader in the United States as a sociologist, historian, civil rights activist, author, the first African American to earn a doctorate at Harvard; later became the head of NAACP)

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## Before You Look For Volunteers

You must first develop a volunteer program!

STAGE 1: Design the program

1. Develop a formal job description and desired qualifications (looking for skills not personalities)
2. Develop a list of interview questions
3. Develop an application form
4. Develop a contract of agreement
5. Develop an informational handbook on the organization
  - a. Mission
  - b. History
  - c. Organizational chart
  - d. Copies of pertinent policies
  - e. Copy of job description
6. Conduct an orientation
  - a. Go through the handbook
  - b. Make introductions
  - c. Give tour
  - d. Develop an evaluation procedure

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## Boomers as volunteers

A "Baby Boomer" is someone who was born between 1947 and 1966.

When considering a "Baby Boomer" for a volunteer position, it is important to understand "where they are coming from". This group generally has more women wage earners, greater financial resources, are used to working long hours and being "on call". Looked upon work as "career".

Boomers are motivated by:

- passion for a cause,
- a desire to feel productive and see results,
- are lifelong learners,
- want to leave a social legacy,
- want choices,
- want collaborative relationships (don't want you to be their "boss" but their peer,
- are seeking "encore" careers,
- have minimal respect for authority,
- are typically not joiners of social organizations.

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## Generation X as volunteers

Generation X or "Computer Babies" are those born from 1965 –1982. This generation has a unique perspective on work. They grew up in an era where both mom and dad had to work, sometimes 70-80 hours a week. When the parents reached retirement age, the Xers often saw the parents get laid off rather than respected for all they gave the company. They were the "latch key generation" left home alone with the TV as a babysitter. They see work as a means to support a lifestyle.

They are looking for:

- fun
- an organization that is flexible
- challenging projects
- a place to learn skills useful in the workplace to help them advance
- a fast-paced technologically up-to-date workplace
- a place that will empower them to make decision not blindly follow directions

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## The Job Description

How can you adequately do your job if you don't know what that entails? And, in turn, how can you hold someone accountable with a job description?

The Volunteer job Description should include:

- Job Title
- Purpose of the job
- Location the volunteer will be working in, if multiple sites
- Key responsibilities
- Who the volunteer reports to, who will train the volunteer
- Time commitment expected
- Any special qualifications or licenses needed
- *Make certain volunteer knows if there are written policies or procedures he/she subject to (criminal background check, drug testing, dress code,..)*

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## Millennials as volunteers

A Millennial or "Digital Baby" is anyone born in 1982 or later.

We are seeing more young people volunteer today because of high unemployment rates.

Millennials are looking for organizations that:

- provide career building opportunities
- Are open and transparent
- Can demonstrate the impact of volunteer service
- Can personalize the opportunities and make them flexible
- Allow work in groups
- Use technology

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## Strategic Messages for Job Descriptions

- Communicate how the volunteer's work or duty will impact the organization
- Highlight the needs the volunteer's efforts will address
- Tell the potential volunteer why you think he or she is well suited for this particular job or duty

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## Part 5 – The Volunteer Job

- a. Job Description
- b. Application
- c. Interview
- d. Contract
- e. Evaluation

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## The application

This may be the same form you use for paid staff. The job title should clearly reflect "Volunteer". This step adds a formality to your process and sends the message to the volunteer that the job of volunteer is taken seriously.

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## The Interview

As is true for any paid job, not every one is right for every position.

Sample questions:

1. How did you hear about our organization?
2. Why do you want to volunteer for our organization?
3. Can you provide us with references?
4. Can you maintain client/data confidentiality?
5. We serve clients with ..... can you remain non-judgmental?
6. Do you understand the training requirements?
7. Are you able to meet the time commitment?
8. Do you have the specific qualifications for this position?
  - a. For instance, a valid driver's license, insurance, and good driving records

### Volunteer Environment/Activity Assessment Instrument

For each of the following statements, circle the number that best describes your organization

	Strongly agree	Agree	Somewhat agree	Disagree
1. The atmosphere is friendly, open and cooperative	4	3	2	1
2. Volunteers trust and support one another	4	3	2	1
3. Volunteers can express what they feel, even when it is negative	1	2	3	4
4. New volunteers easily fit into activities, programs and social activities	1	2	3	4
5. New volunteers feel welcomed and included; cliques and status workers do not exist in group	4	3	2	1
6. The organization keeps everyone informed and ensures they know what is happening	4	3	2	1
7. The purpose of each volunteer driven activity is clearly defined	4	3	2	1
8. The organization involves many volunteers and doesn't rely on a few people to help	4	3	2	1
9. Volunteer assignments are rotated and every one experiences multiple roles	1	2	3	4
10. The organization expects that people are not always able to help	4	3	2	1
11. Volunteers are productive and stay with tasks until they are completed	1	2	3	4
12. The organization adapts well to changes and unforeseen circumstances	4	3	2	1
13. The organization is open to new ideas in using volunteers	1	2	3	4
14. The individual and group achievements of volunteers are recognized	4	3	2	1
15. Volunteers and paid staff function effectively together	4	3	2	1

## The contract

Sample wording:

This agreement (contract) is made between (organization) and (volunteer name) hereinafter referred to as the "volunteer".

The purpose of (organization) is to (insert mission statement).

If utilizes volunteers to: (list basic types of volunteer opportunities).

I (volunteer name) agree to serve in a volunteer capacity as (insert volunteer's title or primary duty).

As a volunteer, I agree to:

1. Perform these duties consistent with (organization's name)'s By-Laws.
2. Perform duties as referred to in the job description for this specific volunteer position.
3. Perform these duties in a professional and ethical manner consistent with the privacy and confidentiality, Code of Ethics, and Conflict of Interest Policies of (organization name).
4. Use common sense and act in the best interest on (organization name).

(Organization name) agrees to:

1. Provide me with the tools and resources necessary to be an effective volunteer.
2. Provide orientation and training for me in my assigned role.
3. Supervise me in the fulfillment of my duties.
4. Extend opportunities for me to grow and develop as a volunteer.
5. Cover qualified volunteers with the appropriate insurance coverage.

I agree to function within the role defined herein by (organization name) and conduct myself in a manner consistent with its mission and goals.

By: \_\_\_\_\_ By: \_\_\_\_\_  
 Authorized representative of (org) (Volunteer Name)  
 Title: \_\_\_\_\_ Date: \_\_\_\_\_

## Part 6 – The 3 R's

Recruit  
 Retain  
 Recognize

## Develop an evaluation process

SAMPLE

Organization Name  
 Performance Planning & Review

Volunteer: \_\_\_\_\_ Job Title: \_\_\_\_\_  
 Location: \_\_\_\_\_ Date: \_\_\_\_\_

Key Results Areas (tasks, projects, activities)	Key Expectations	Unacceptable	Acceptable	Excellent	Comments

General Performance Characteristics

Safety \_\_\_\_\_  
 Attitude \_\_\_\_\_  
 Initiative \_\_\_\_\_  
 Teamwork \_\_\_\_\_  
 Punctuality \_\_\_\_\_  
 Commitment to Mission \_\_\_\_\_

Volunteer: \_\_\_\_\_ Supervisor: \_\_\_\_\_ Date: \_\_\_\_\_

## The 3 R's

Recruitment, Retention, Recognition

Okay, so now you have recruited your volunteers , oriented them to your organization, and provided adequate training. How do you keep them?

Volunteers experience burnout as well.

## Ready to Recruit/Cultivate

### Identify and Cultivate

Use your current staff members and volunteers to identify new volunteer candidates

Revisit roles and responsibilities to streamline job descriptions and roles

Take the recruitment seriously and make it a formal process

Hopefully, you have already created a culture of using people's time efficiently

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## Recruiting Assistance

[www.volunteermaine.org](http://www.volunteermaine.org)

Retired Seniors Volunteer Program ([www.seniorcorps.org](http://www.seniorcorps.org))

[www.servenet.org](http://www.servenet.org)

[www.Volunteermatch.org](http://www.Volunteermatch.org)

[www.idealists.org](http://www.idealists.org)

[www.volunteer.org](http://www.volunteer.org)

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## Strategies

1. Identify gaps, "who's not here"
2. Look for people with specific skills or areas of expertise, not names
3. Appeal to the individual's interest and match volunteer opportunities to those interests
4. Hold a volunteer luncheon and hand out referral forms - let them assist you in your recruitment efforts
5. Involve volunteers in decision-making processes
6. Use appropriate language and photos in recruitment material that attract and repel potential volunteers
7. Don't just "fill the seat"

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## Addressing Volunteer Burnout

Get to know your volunteers

Share the workload

Offer the right tools, resources, and opportunities for success.

Communicate clearly, listen actively, and provide encouragement.

Create a "task driven" volunteer program.

Foster an environment that is welcoming.

Thank volunteers formally and informally.

Be organized.

Show that you care.

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## Do you meet their needs?

Volunteers meet many needs for a non-profit organization, but as we learned that there are a number of reasons people volunteer, we must meet their needs as well.

Twelve basic needs of volunteers:

1. I want a specific manageable task.
2. I want a task that matches my motivation level.
3. I want a good logical reason for doing that task.
4. Written instructions are GREAT!!!
5. Please give me a reasonable deadline for completing my task(s).
6. Give me the freedom to complete the task. I need supervision and training, not micro-management.
7. Provide me with the tools and resources to complete the task(s).
8. Provide me with adequate training.
9. Provide a safe, comfortable, friendly environment.
10. Follow-up with me.
11. Give me the opportunity to provide you with feedback.
12. You're not paying me, so appreciate, recognize, and reward me!

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## Part 7 - Protecting Your Volunteers

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## Volunteer Protection Act of 1997

Volunteer Protection Act of 1997  
In 1997, President Clinton signed into law the Volunteer Protection Act of 1997 (Act) that, generally speaking, provides immunity from tort claims that might be filed against the volunteers of nonprofit organizations. NPCC's Government Relations Committee is considering supporting legislation that would make such protection contingent on the organization carrying general liability insurance at adequate levels. The Act raises some serious questions that are briefly outlined here.

When an individual performs volunteer services for a nonprofit he exposes himself to the risk of having a claim filed against him by someone who believes he has been hurt by the volunteer. The most significant kind of nonprofit liability involves bodily injury—people being physically hurt. Bodily injury claims are particularly troublesome since they can involve demands for large amounts of money. Recoveries for pain and suffering can be huge and such claims can be financially devastating for those against whom they are filed. It should be kept in mind that when an employee or volunteer carelessly hurts someone, not only will he be liable, but the organization for whom he works will also be liable for the reason that principals are liable for the acts of their agents.

It is to protect against such exposures that nonprofits carry general liability insurance. A general liability insurance policy protects an organization against bodily injury and property damage claims. Board members are covered and frequently employees are also covered. However, most general liability policies do not cover volunteers. Special insurance can be purchased fairly inexpensively to cover its volunteers' potential liability, but many nonprofits are neither aware of its availability nor have sufficiently considered the liability exposures of their volunteers. It should be noted that a fair number of nonprofits do not carry any sort of general liability insurance. The Volunteer Protection Act provides immunity from lawsuits filed against a nonprofit's volunteer where the claim is that he carelessly injured another in the course of helping the nonprofit. The Act does not provide immunity to the organization itself.

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## What if we get a “problem” volunteer?

Getting the volunteer is 98% of the work and can result in fewer problems later.

It is important to be certain that the volunteer is a fit for the work ethic you are looking for in a volunteer or employee.

Be certain to set SMART goals up front for the volunteer.

- Specific
- Measurable
- Achievable
- Realistic
- Time sensitive

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## Protecting your volunteers

Commercial Liability Insurance

Directors & Officers Liability Insurance

Volunteer Insurance

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## What if you don't want to retain them?

Just as with paid staff, you will have volunteers who are simply not doing the job in which they have been placed, or they have acted inappropriately.

This is one very important reason for the volunteer job description, contract agreement, and handbook with pertinent policies.

Volunteers may be “transferred” or terminated. If termination is necessary, try to break ties without any hard feelings or ill will. Remember the old marketing adage that every one person knows 250 others.

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## Part 8 – Problem Volunteers

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## Firing a Volunteer

This should be looked at in the same way that you view firing a paid staff person.

- Did you clearly state the rules, expectations, procedures?
- Did you vet the volunteer to make certain it was a good fit?
- Did you provide orientation and training?
- Did you monitor, evaluate and provide feedback?
- Did you address any problems along the way?

If not, you must address those issues first as you would with a staffer.

If so, make certain everything is documented!

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## Rules to live by

The rules are really the same as when you have to fire a paid staffer.

1. Have a checklist - application complete, orientation complete..., evaluation due on \_\_ date
2. Keep a file just like you would with an employee to include copies of anything he/she signed, any reprimands or warnings, any recognitions earned...
3. You should have a volunteer handbook just like you would have an employee handbook that outlines procedures for grievances, warnings, disciplinary steps... Is there a probationary period? Is there a certain date for improvement? Make certain the volunteer understands consequences for non-compliance.
4. Do not "let someone go" if you are the only one in the office.
5. Can you provide another option? Retirement, transfer, ...
6. Do not disclose information to a staffer or other volunteer. Respect privacy!
7. Directors should be involved if this is a major donor or high profile volunteer.
8. Make note of any threats.
9. DOCUMENT! DOCUMENT! DOCUMENT!

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## No matter what

Regardless of what type of recognition you choose, you must be:

- Sincere
- Specific
- Immediate
- Personalized

Pick a type of reward that can be used repeatedly without the volunteer getting tired of that way to reward him or her.

A t-shirt may be appreciated the first time, but will it be year after year?

A lapel pin is perhaps not something they will use every day. Is it, therefore, effective?

What is their favorite snack? What do they like to do for fun? Successful recognition and reward depends of knowing your volunteer. It may even involve a survey.

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## Part 9 - Volunteer Recognition

### Volunteer Recognition Checklist

Always Sometimes Never

- Do we understand the volunteer's personal limits and refrain from asking too much from them?
- Do we build volunteer assignments around their schedules, not ours?
- Do we offer a sufficient "thank you" and write thank you notes?
- Do we send birthday cards?
- Do we offer small rewards as tokens of our appreciation?
- Do we share the testimonials to volunteer contributions with them?
- Do we take the time to talk and explain things fully?
- Do we welcome volunteer suggestions?
- Do we keep volunteers informed about our organizations and its work?
- Do we involve volunteers in our plans and our planning activities?
- Do we reimburse assignment-related expenses?
- Do we provide volunteers with a good orientation?
- Do we provide volunteers with formal training?
- Do we offer volunteers the opportunity to assume leadership positions in the organization?
- Do we provide an annual recognition event?
- Do we provide an outing, just for fun and enjoyment?
- Do we call public attention to the contributions of our volunteers?
- Do we treat volunteers as organization VIPs?

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## Types of Rewards

There are different ways to recognize and reward a volunteer. Some are "social", some are "intangible". Determining how to recognize should be tied back to what motivates this particular volunteer. Determining whether or not to recognize shouldn't be a question.

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## Informal Recognition

Understand limitations, don't ask too much

Birthday cards

Say "thank you"

Take the time to talk and explain

Keep them informed so they feel a part of the organization

Many volunteers today prefer you spend the big money on programs and not on them. There are other ways to thank them - donations of free food gift cards, free gas cards...

Perhaps they can benefit from job referrals or references.

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## QUESTIONS?



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