

Tobi Johnson's
ULTIMATE GUIDE

|||||||||||||||||||| TO MANAGING VOLUNTEERS



Tobi Johnson's Ultimate Guide to Managing Volunteers

*Successful Volunteer Involvement Tactics
for Every Phase of the Volunteer Lifecycle*

by Tobi Johnson, MA, CVA

The Ultimate Guide to Enthusiastic, Effective Successful Volunteer Involvement
at Your Nonprofit: Tactics for Every Phase of the Volunteer Lifecycle
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PO Box 23408

Knoxville, TN 37933-1408

206.799.9038

tobi@volpro.net

www.volpro.net

Facebook - <https://www.facebook.com/volpronet/>

Twitter - <https://twitter.com/volpronet>

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VolunteerPro is a volunteer management training hub designed to save you time and accelerate your skills and impact.

Tobi Johnson, MA, CVA is an internationally recognized author, speaker, thought leader in the field of volunteer engagement. She is the President of [Tobi Johnson & Associates](#) a consultancy that helps nonprofits of all sizes strengthen their volunteer strategy. In 2015 she founded [VolunteerPro](#), an online learning and networking community for leaders of volunteers.

Tobi is also a contributor to *Volunteer Engagement 2.0: Ideas and Insights for Transforming Volunteer Programs in a Changing World*, published by Wiley & Sons in May 2015. Each year, she also publishes the [Volunteer Management Progress Report](#), a global state-of-the-industry survey that tracks trends in volunteer coordination.

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Introduction

Volunteers are much more than a money-making pair of hands for your nonprofit. They bring special skills, are trusted service delivery partners, and can extend your connections with diverse communities far beyond your agency's doors.

In addition, volunteers are donors and donors are volunteers. Volunteers are key financial contributors, donating ten times more than non-volunteers. Two-thirds (67%) of volunteers report they often donate to the same organization where they volunteer. Half of volunteers say volunteering inspires them to give a larger donation. 58% are more likely to donate before volunteering. Two in five volunteer first and then make a financial contribution. (Sources: *Volunteerism and Charitable Giving in 2009*, Fidelity® Charitable Gift Fund and VolunteerMatch.org, 2009, *Time and Money: The Role of Volunteering in Philanthropy*, Fidelity® Charitable Gift Fund, 2014)

Volunteers also generate a plethora of in-kind resources for organizations, such as meeting space, donations of materials and food, event raffle items, and the fuel they use to drive to their volunteer assignments.

The value of volunteers can't be ignored. But, successful volunteer involvement doesn't happen by accident. It requires a focus on the right tactics at the right time to fully realize the power of volunteer time and talent.

With a little time and attention, nonprofits like yours can reap the true benefits of volunteerism and build a sustainable support platform to ensure future success.

The Volunteer Engagement Cycle

Below is a graphic depiction of all of the human resources management activities throughout the volunteer lifecycle. Although organizations often focus solely on recruitment and recognition, all are important for creating an infrastructure of support where volunteers can be successful.

To set the stage for successful volunteer engagement, each step in the volunteer engagement cycle needs to be planned for. In addition, each step should be assigned to a paid staff person who is expected to have ultimate responsibility for that phase. This means including this responsibility in their job description.

It may be one person, or a series of people working together, but don't leave this up to chance. If not, the tasks simply won't happen.



<p>Needs Analysis</p> <ul style="list-style-type: none"> • # Volunteers • Volunteer Roles • Infrastructure 	<p>Orientation/Training</p> <ul style="list-style-type: none"> • Welcome to Organization • Policies & Procedures • Technical Training Per Role
<p>Recruitment</p> <ul style="list-style-type: none"> • Target Audience Analysis • Volunteer Appeal/Impact Statement • Partnerships 	<p>Resourcing/Supervision</p> <ul style="list-style-type: none"> • Teams • Delegation • Designated Supervisor
<p>Screening</p> <ul style="list-style-type: none"> • Risk Management • Criminal Background Check • Understanding Motivations 	<p>Recognition</p> <ul style="list-style-type: none"> • Feedback About Achievements • Leadership Opportunities • Awards
<p>Placement</p> <ul style="list-style-type: none"> • Matching with Appropriate Role • Training Plan 	<p>Evaluation → Retention</p> <ul style="list-style-type: none"> • Volunteer Program Quality Assurance • Ongoing

Needs Analysis

After deciding who will be responsible for what, the next step to successful volunteer involvement is to conduct a needs assessment to determine which roles are needed at your nonprofit.

Even if you have a current active volunteer corps, this step is important to undertake annually. If you've been involving volunteers in the same old ways, year after year, you're probably missing out on some real opportunities for innovative, high impact support.

To pinpoint your current needs, conduct a volunteer workforce needs analysis and then map the types of volunteer involvement throughout your organization in order to uncover gaps and unearth areas of real potential.

Volunteer Workforce Needs Analysis

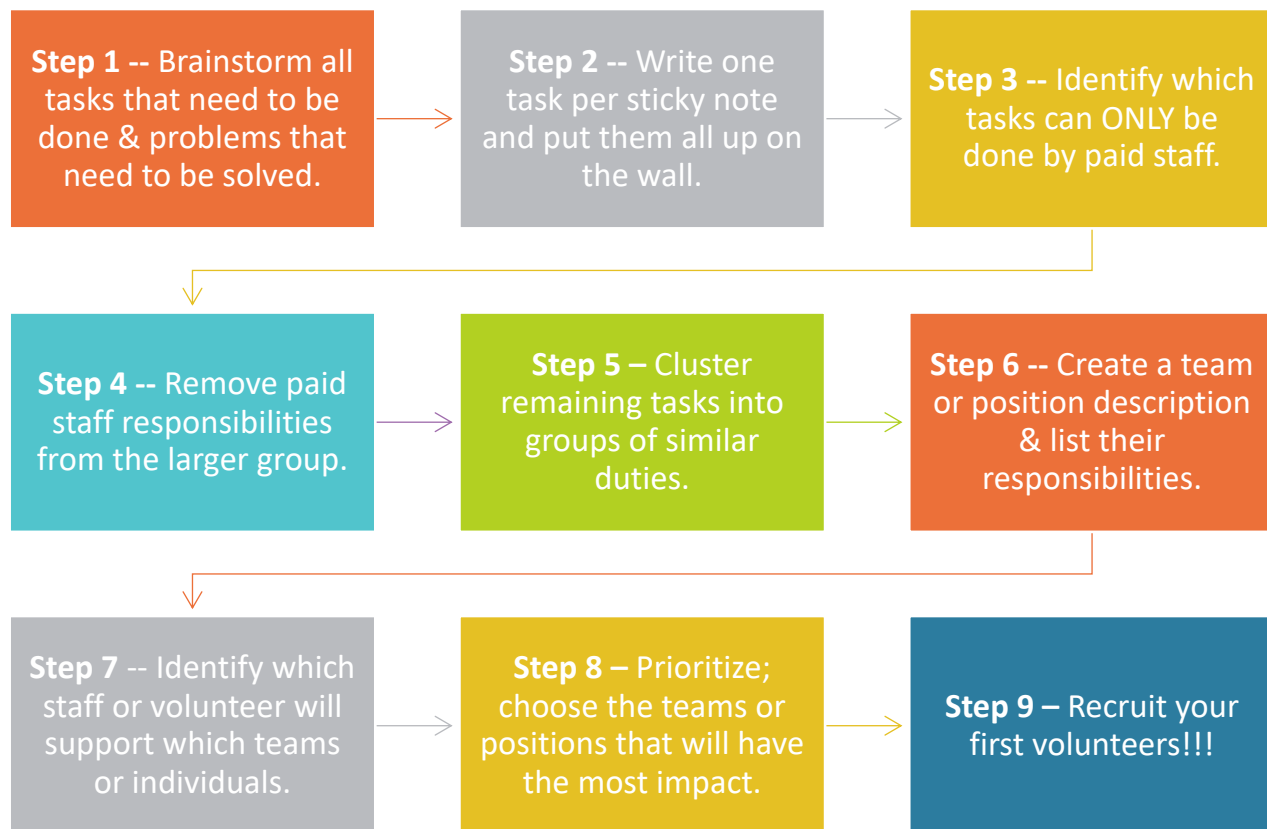
Use the process outline below to brainstorm and sort all of the possibilities for volunteer tasks and roles that might help support your program. (Note: We use the word "workforce" to truly reflect the important role of volunteers.)

Don't forget to include volunteers in this process. Their perspectives are unique in the dual role as both "insiders" and "outsiders." They will no doubt have ideas that you haven't thought of yet and may have a more nuanced understanding of the workforce gaps in their current work area.

Also, think carefully about the tasks on your list that people believe can only be performed by paid employees. Is that really the case (and sometimes it is)? Or is it simply "because we've always done it this way"?

The Process

Below is a step-by-step process that can be accomplished in an afternoon. Assemble a small team to work it through. All you need is some markers, a pad of medium size sticky notes and a blank wall.



Mapping Volunteer Roles Agency-wide

It's also a good idea to map out the number of volunteers you have in each type of role. This will give you a "bird's eye" view of the variety (or lack thereof) current volunteer involvement across your organization.

Start with the department you know does well with volunteer utilization and work from there, listing the department name and then the number of volunteers currently active in each role. You can also list in parentheses the ideal number they wish to have in each role

Share the matrix widely. This helps encourage (through a little peer pressure) departments that haven't involved volunteers very deeply to do so.

Department	One-time Events	Project-based Teams	Pro-bono/Specialized/Skills-based	Traditional	Other

Recruitment

Most of weren't born uber-talented marketing Mad Men. But, you can convert our volunteer recruitment postings from blah to bling with a little thoughtful planning. Use the tips below inspire solid recruitment ideas and to write interesting and compelling ad copy for your next volunteer recruitment campaign.

The One Big Idea

Start by identifying your one big idea, your thesis. Your recruitment copy thesis is the one big argument you will make for the benefits of volunteering. It should describe one compelling reason that joining your cause makes sense for volunteers and will address a key volunteer "problem" (see below). It will also be your guiding star as you develop the rest of your recruitment campaign messages.

Copy Thesis Formula:

Any **[type of volunteer you seek]** can **[solve their problem]** by volunteering for your cause because **[how it solves their problem]**.

For Example:

"Anyone who cares about our neighborhood health can help keep it clean and green by volunteering for the West Town Greenway -- we will show you how to educate kids on easy ways to reduce pollution."

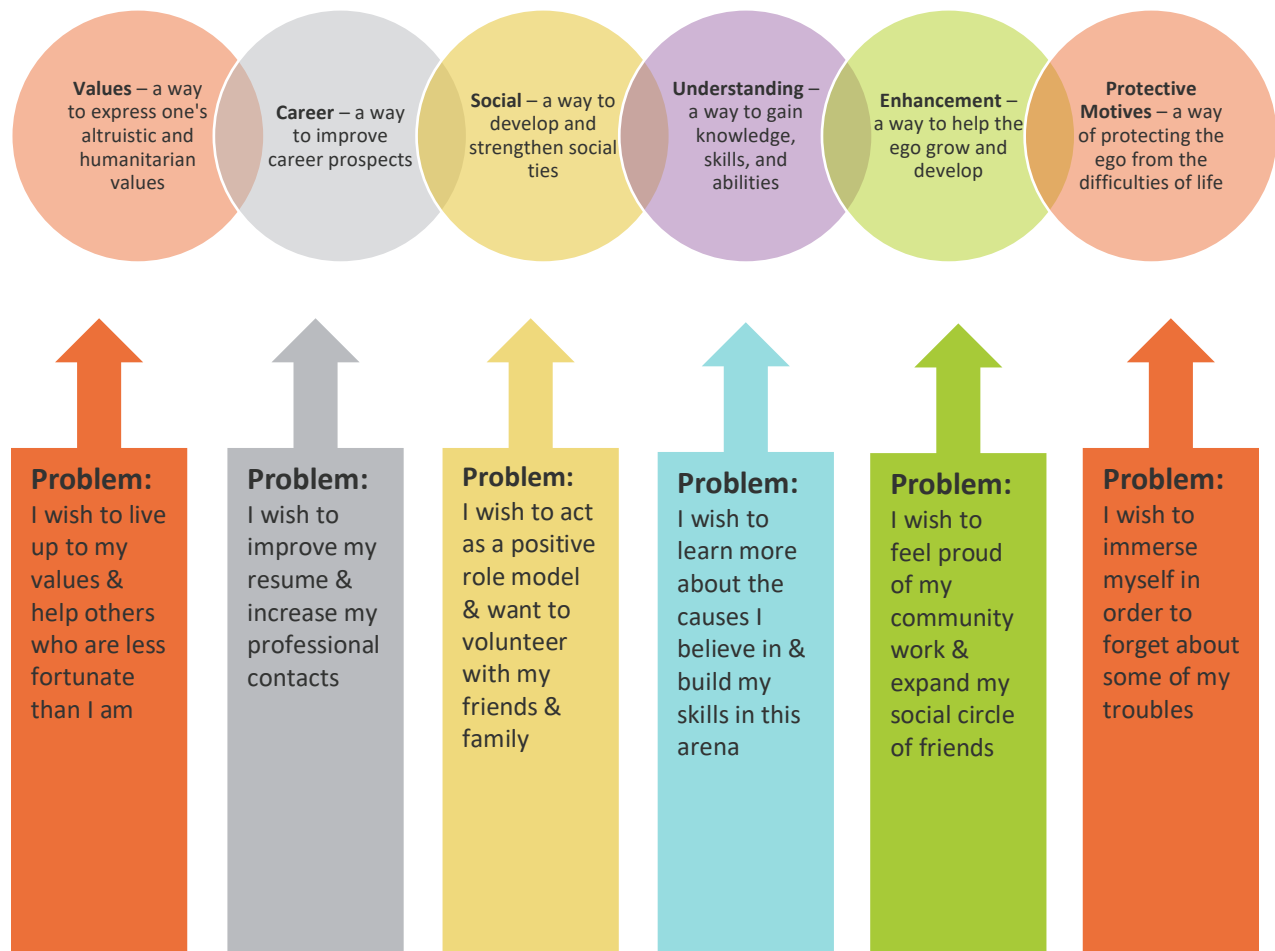
Volunteer "Problems" That Need Solving

Second, you should focus your recruitment messages on volunteer needs that your organization can meet. Below are six well-researched motivations for volunteering and the volunteer "problem" or need each serves.

We don't usually think about volunteer needs or "problems" they hope to solve. But, research has shown that volunteering serves specific functional needs for people in their lives. We humans are self-centered, but not necessarily selfish. We hope to have needs met (conscious or unconscious)

and oftentimes those needs align with giving back to the community or helping others.

Focus on only 1-2 per campaign and build your messaging around them. If possible, include volunteer quotes or testimonials that offer proof that the “problem” is “solved” or the need met.



Addressing Objections to the Request to Volunteer

It also helps to have a plan in place to proactively address any concerns prospective volunteers may have about supporting your cause. Most requests or offers are met with 5-6 common objections.

Identify the most common you encounter from prospective volunteers and answer them in your ad copy. You'll be more successful if you can counter doubts before they are even expressed. Below are a few common objections and responses. Yours may differ, depending on your cause and volunteers.

Objection	Possible Response
Don't have the time	"You can volunteer for as little as X hours a month, and you can set a schedule that works for you" or "We can add you to our waitlist and contact you at a future time of your choosing."
Physical Limitations	"We can look into short-term tasks that you can do from home."
Don't have adequate transportation	"We arrange carpools with other volunteers" or "You can volunteer from home and meet over video chat." or "we offer free bus passes."
Don't know how to get started	"The process is simple. We'll send you an application packet to help you get started. The first step is to complete the application form and send it in."
The training is too long or complex	"You can learn at your own pace, and we provide ongoing support until you feel completely comfortable working on your own."
The job is "too big"	"We match new volunteers with experienced volunteers for 'job sharing.' You can also work with a team of busy people like you who share the workload."

Screening

Although we often think about volunteers screening as a way to mitigate potential risk, this is also a unique opportunity to better understand the motivations of the volunteer applicant.

It's really a two-way street. Screening activities not only help inform staff as to whether or not a volunteer may be a good fit, they also are an excellent time to identify and note down what might keep them motivated further on down the road.

Volunteer Interviews

In addition to application forms, volunteer interviews are one of the most common volunteer screening tactics. They should always be conducted as a two-way conversation and are the first step in developing a potentially rich partnership. So, plan to spend 50% of the time listening for the volunteer's wishes, hopes, and expectations.


Interviews are also a great place to gently address any misconceptions or unrealistic expectations on the part of the volunteer.

There are some critical pieces of information to learn about your applicant during an interview:

- What are the causes they feel passionately about?
- What are their "Must Have's" and "Non-Negotiables"?
What brings them the most joy?
- How do they like to be appreciated?
- What are adjustments that can be made to address the volunteer's needs?
- Have they met your minimum qualifications?
What skills do they have to share?
How does the volunteer react to specific situations?

Volunteer Interest Worksheet

Using a Volunteer Interest Worksheet that covers the topics below can help volunteers safely communicate their needs and also help you assess their interests and skills. This will also help you hone in on what volunteers are willing and eager to do. You can use the completed worksheet as a starting point for discussion during volunteer interviews.



I am passionate about ...
I am happy to help with ...
I want to learn how to ...
Please don't ask me to ...
I thought you should also know ...

Placement

One way to ensure that you are matching volunteers with appropriate jobs within your organization is to develop a volunteer position description for each role. Create a set for existing roles, but don't be afraid to amend them to better match volunteer needs and accountability. Flexibility in setting up the roles at the outset is fine. Try to accommodate where you can, but make sure there is a clear agreement before you go any further.

Volunteer tasks and expectations should be written in a way that ignites their inner superheroes, not in a way that deflates their sense of what's possible. Use the template below to develop an informative and inspiring document that helps volunteers understand their role and commitment to the

organization and paints a picture of the successes they will help achieve. Keep it brief and upbeat with no jargon.

Volunteer Position Description Template

Position Title (it doesn't need to be dry, can be creative)

[insert agency's **philosophy of volunteer involvement** (why are volunteers included as part of the agency's human resources strategy beyond simply and an extra pair of hands or to save money, what unique value to they bring to the table?)]

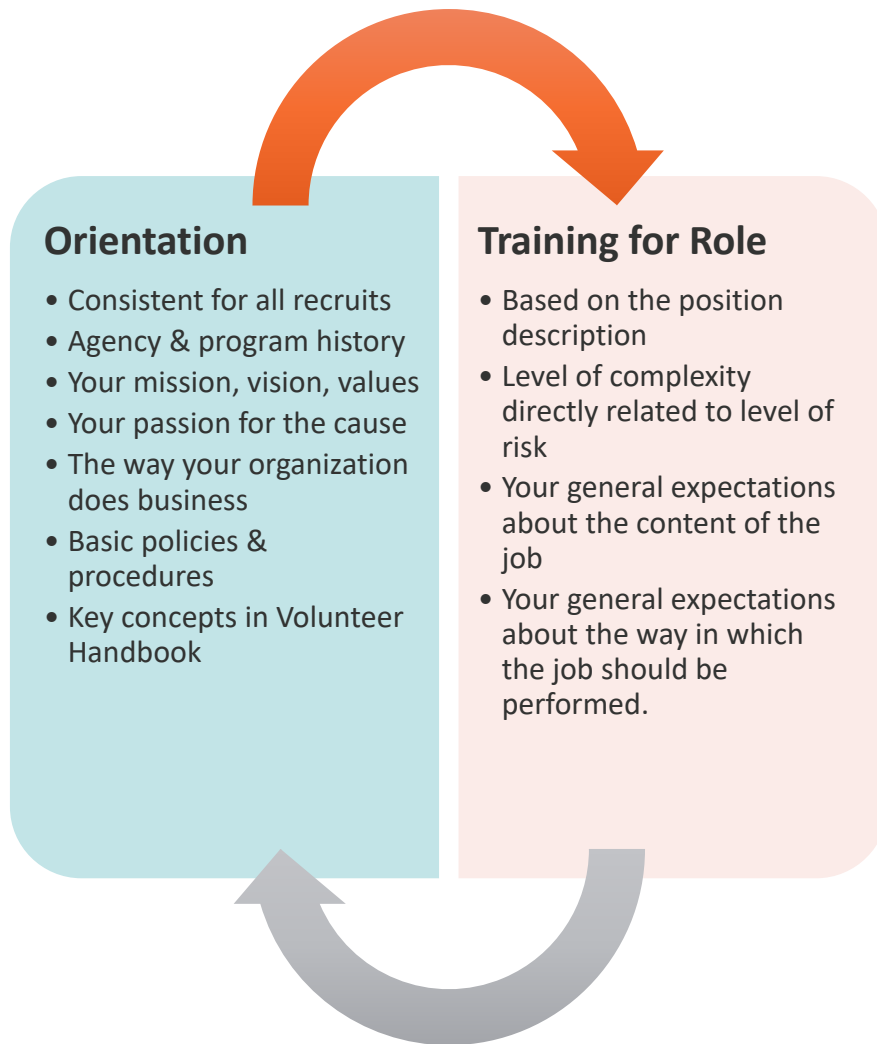
- **Goals the Role** (general statement of what the job is, how it relates to the overall goals of the organization)
- **Impact of the Role** (list 3-5 key achievements in the past year, what have other volunteers have achieved through this role? how does the position affect the community and people served by the program? why does it matter?)
- **Duties and Responsibilities** (include a bullet list of specific duties and requirements, using action verbs & present tense, describe only one duty or task at a time, focus only on those that are most important)
- **Time Requirements** (realistic number of hours required per week/month, length of commitment, start & end date)
- **Location** (the primary location where the work will be performed)
- **Work Environment** (where the work will take place, any special tools that will be used, or info about physical requirements of the job)
- **Skills & Qualifications** (only those that are essential, or add a short additional list of desirable qualifications, address any misconceptions about what is required)

- **Orientation & Training** (what the volunteer can expect to receive, length & date if you know it, list additional training opportunities)
- **Supervision** (who will be the volunteer's direct supervisor, their contact info)
- **Volunteer Benefits** (any volunteer perks, including whether reimbursement for expenses is available)
- **How to Apply** (link to the application form, where and when to submit, what to include, contact name and info for the recruiter)
- **What People Are Saying** (3-5 quotes from volunteers & paid staff about the value of the specific role, you can put these anywhere in the document – at the top, distributed in callout boxes throughout, at the bottom, include names of those quoted and their job title or volunteer role at the agency)

Orientation/Training

Orienting volunteers to how your organization functions and their role within it is not the same as technical training about their role. Before they learn the “ins and outs” of the job they will undertake, volunteers need to know something about your organization, so they are equipped to represent you to the public accurately. Also, they need to get familiar with your organizational culture and “how we do things around here.”

Orientation training is also a great time to dispel myths about volunteering and give new recruits a clear picture of both their commitments and rewards. Get current volunteers involved!



Activities with a Purpose

Choose the activities you include in orientations and technical training for the role with intention.

Use one or more of these activities to increase the participation, reflection, learning, and teamwork of volunteers. See the next few pages for three specific teambuilding exercises to support volunteer teams as they come together.

Type	Purpose	Examples
Icebreakers	To build trust or introduce a key point to learners	<ul style="list-style-type: none"> • Introduction Activities • Hit or Myth • Meaningful Stories • Team Goals & Norms
Energizers	To re-invigorate learners that are losing energy or to re-focus on an important point	<ul style="list-style-type: none"> • Movement • Games/Competitions • Humor • Teambuilding/Team Spirit Activities
Closers	To remind learners of a key point or leave them with a strong emotion	<ul style="list-style-type: none"> • Reinforcing/Reviewing Key Ideas • Group Wrap Ups • Evaluations • Appreciations

Teambuilding is Important, Too.

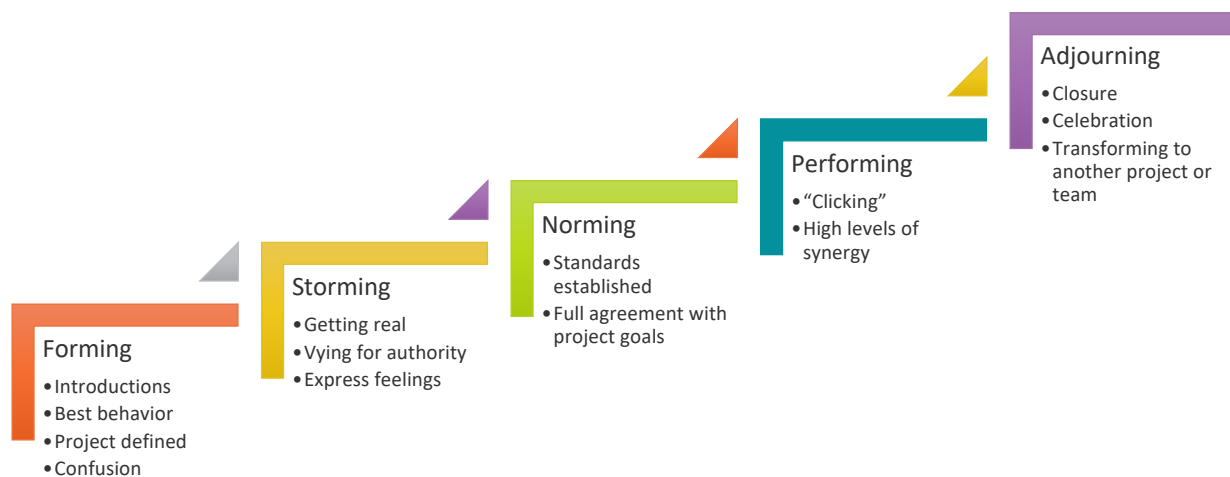
Most volunteers learn the technical tasks they need to be successful while they are on the job, even if they attend classroom or online training. They learn, teamwork, however, through your example and guidance.

You'll have a better chance at success if you set the stage for greater trust and teamwork by integrating relationship-building activities into your volunteer training. Use the activities below to help foster greater sensitivity and tolerance for diverse perspectives and to foster greater teamwork within volunteer teams and with staff.

Activities like these may, at first, appear to suck up your precious training time. But, they achieve hidden results that will pay off major dividends later.

The Psychology of Teambuilding

The Tuckman Stages of Group Formation model of group development was first proposed by Bruce Tuckman in 1965, who maintained that these phases are all necessary and inevitable in order for the team to grow, face challenges, tackle problems, find solutions, plan work, and deliver results. These apply to both paid teams and volunteer teams.



Here’s a breakdown of each phase:

Forming -- The volunteer's behavior is driven by a desire to be accepted by the others, and avoid controversy or conflict. Serious issues and feelings are avoided, and people focus on being busy with routines, such as team organization, who does what, when to meet each other, etc.

Volunteers are also gathering information and impressions. This is a comfortable stage to be in, but the avoidance of conflict and threat means that not much actually gets done.

Storming -- The team addresses issues such as what problems they are really supposed to solve, how they will function independently and together and what leadership model they will accept. Team members

open up to each other and confront each other's ideas and perspectives.

The storming stage is necessary to the growth of the team. It can be contentious, unpleasant and even painful to members of the team who are averse to conflict. Tolerance of each team member and their differences should be emphasized. Without tolerance and patience, the team will fail.

Norming -- In this stage, all team members take the responsibility and have the ambition to work for the success of the team's goals. The danger here is that members may be so focused on preventing conflict that they are reluctant to share controversial ideas.

Performing -- The team members are now competent, autonomous and able to handle the decision-making process without supervision.

Dissent is expected and allowed as long as it is channeled through means acceptable to the team.

Adjourning – This stage involves completing the task and breaking up the team.

This is a great time to celebrate accomplishments and reflect on successes and what you might change for the next project.

Teambuilding activities can be purposefully chosen to support successful transition through a specific phase of team formation. Below are three.

Forming: The Joy of Six

- **Objective:** To demonstrate the satisfaction of being included and the unease of being excluded
- **Materials Needed:** Messages and envelopes, prepared in advance for all participants
- **Estimated Time:** 10 minutes

Instructions:

- Choose a short, themed phrase that represents the topic of your meeting or your program. Duplicate the phrase on small pieces of paper and put them in envelopes. If 10 or more people will attend the meeting, make 6 total. If you have less, create less.
- Create similar envelopes of 1 to 5 other messages (one unique message per envelope), depending on how many participants you have.
- At the meeting, give one envelope to each participant.
- Ask participants to open them and find the other people who have the same message in their envelope.
- When everyone has clustered, you will have one group; the rest should be alone.

Questions for Reflection:

- When they have found someone who has a similar phrase, ask participants to reflect on the experience and share their thoughts with the group.
 - How does it feel not to be accepted into a group or team? Has this ever happened to you on the job or when you were volunteering?
 - How did you feel when you found someone with the same message?

- How did you feel when you could not find anyone with the same message?
- Did those already in the team reach out to the others? Why or why not? What policies, procedures or self-interests keep us from including others in our teams?
- What can we do to include others “in the loop”?
- What lessons does this have for our own teambuilding?

Storming: I Wish, I Wish

- **Objective:** To unearth unspoken problem areas in a team so that they can be addressed.
- **Materials Needed:** 3 x 5 cards, pens
- **Estimated Time:** 20 minutes
- **Instructions:**
 - Point out the importance of periodically checking the levels of team cohesiveness, cooperation, and member satisfaction. Tell participants that the activity will be one of those periodic check-ups.
 - Hand out 3x5 cards to everyone, and ask them to write their answers to the following questions on the cards, one per card. (Let them know that they don't need to sign their names and encourage them to be honest about their experiences.)
 - If you could change anything about the team's mission or its way of operating, what would you change?
 - If you could change anything about your role on the team, what would you change?
 - Collect the cards, and group them by theme. Then, ask individuals or small groups (depending on the size of the team) to synthesize the information from one group of cards and report back to the group.

- Be ready to provide decisions about what may need to change, either during the meeting or in the near future.
- **Questions for Reflection:**
 - After individuals have reported back, ask participants to reflect on the experience and share their thoughts with the group.
 - What do you like best about your role and functions on the team?
 - If you were king or queen for a day, what would you change about the organization or the team?
 - What could we do to make your job better or easier?
 - What prevents us from making these changes?
 - What might we gain from making these changes?

Norming: How Should We Proceed?

- **Objective:** To help identify team norms, set goals and introduce touchy topics in a fun way.
- **Materials Needed:** Flip chart (or dry erase board) and markers
- Estimated Time: 30 minutes
- **Instructions:**
 - Prepare a flip chart with two columns, one with “worst” and one with “best” written above.
 - Ask participants to call out the best and worst characteristics of teamwork or give examples of good and bad teamwork, behavior in meetings or productivity they have experienced.
 - Write their answers under the appropriate column (you may need two people to write if there is a lot of energy).
 - For each item, ask participants to share their reason for putting it on the list.

- Ask participants what actions they can take to be more effective based on the “best” list and a few things they can change or improve upon from the “worst” list.
- Develop team norms based on what is identified.
- **Questions for Reflection:**
 - After the group has completed their list of norms, ask participants to reflect on the experience and share their thoughts with the group.
 - Which of the items on the lists do you think the team will have difficulty with?
 - Based on this discussion, what topics should we specifically address in future meetings?

Resourcing/Supervision

The key to successful volunteer supervision is delegation. Expanding the roles and responsibilities of volunteers, by enlisting their support for a wide array of tasks, can help you focus on the most critical parts of your job, all while growing volunteer skills and creating a more efficient team.

Deciding What to Delegate

Here are a few ways to identify things you might delegate. First, review the following to identify areas you can increase efficiency.

- **To-Do List(s)** – Look through your daily, weekly, monthly, quarterly to-do lists. Does everything need your personal touch, or could you train a capable volunteer to take on some of the responsibility?
- **Goals** – Look at the goals you set for the year. How are you doing meeting those? Are there any that could be expedited with the help of another person?

- **Processes** – Take a look at your regular processes; client intake, scheduling, inventory, training, etc. Which tasks could be managed by volunteers?
- **Productivity** – Are there any bottlenecks that could be smoothed out if an additional volunteer were added to the mix?

Also, consider these specific tasks and areas as possibilities for delegation.

- **Repetitive Tasks** – If it's a repetitive task that then you can train someone else to take it on.
- **Your Weak Spots** – Don't waste your time on things that aren't your strengths.
- **Things You Hate To Do** – If you hate them, they probably aren't getting them done.
- **Areas Where You're Not an Expert** – Don't waste your time learning new roles or skills unless it's essential to development.
- **Tasks That Monopolize Your Time** – Time-consuming tasks need to be looked at carefully for delegating opportunities, even if it's only partial delegation.
- **Tasks That Remove You From the Role of Leader** – Your role is to be a visionary and focus on growth, that's hard to do if you're always in the trenches.

How to Delegate in 7 Steps

Delegating is simple if you plan ahead and are willing to truly let go. Below are seven steps to a successful handoff of responsibilities.



- 1) **Prepare** – appropriate person/team, expected results, level of authority, possible problem areas, etc.
- 2) **Assign Task** – deliverable, deadline, expectations for communication and updates: frequency, content, in person or via email, etc.
- 3) **Confirm Understanding** – “How would you explain this task to a fellow employee?” Do they have the tools and resources to be successful? Do they understand what the task will require?

- 4) **Get Commitment** – re-affirm their level of autonomy, get a verbal affirmation, be sure log the various tasks you delegate
- 5) **Coach** (to avoid “delegating back”) – provide confirming and corrective feedback, refer to resources (human and otherwise)
- 6) **Require Accountability** – set dates for status checks, agree upon a contingency plan
- 7) **Acknowledge Learning & Celebrate Success** – reflect on results, publicly knowledge success, privately praise personal growth

Levels of Autonomy & Initiative

When delegating, it’s also reassuring to know that there are many options for levels of autonomy and initiative, based on the task and the volunteer assuming it.

It’s your choice! Decide which level you feel most comfortable with for each task you delegate. Consider starting small and working toward greater autonomy with a volunteer.



Keep Improving

Over time, you'll become more comfortable with your delegation style and process. To accelerate your skills, take some time to reflect on how it went each time you delegate. Make notes on ways you can improve next time.

Follow the following simple principles for empowering volunteers and you'll be even more effective.

- Provide job aids & supports (checklists, tip sheets, reference tools, mentors, coaches, etc.)
- Make it safe to fail
- Set appointments for check-ins
- Don't rescue!

In addition, after each project or task completed by a volunteer, ask yourself the following:

- Was the task fully delegated? Did I explain it well?
- Did I provide clear direction (deadlines, steps, etc.)?
- Did they have the resources to carry out the task?
- Did they know the goal and why it is important to the bigger picture?
- Did I set up a plan to monitor progress and keep them accountable?

Recognition

In the recruitment section earlier in this eBook, we mentioned six key, research-based volunteer motivations or needs. Not only does it make sense to focus your recruitment messaging around these needs, but to align recognition activities around them as well.

You can include these themes in all types of recognition communications such as talking points for speeches, thank you notes, appreciation signage, newsletter articles, etc.

Below are some general guidelines and a few specific ideas that apply to each of the six volunteer motivations.

Values

- Connect the organization's mission to the volunteer's personal values whenever possible.
- Design volunteer opportunities that offer ways to meaningfully serve others, not just complete menial tasks.

Idea: Give Them a Real Chance and Real Credit -- Provide opportunities to meaningfully serve others and then promote the results. For example, post updates on the achievements of volunteer teams in the lobby of your organization.

Career

- Providing specific skills development activities that can help advance a volunteer's career prospects.
- Facilitate professional networking for volunteers both within your organization and outside it.

Idea: Vouch for Their Skills -- Provide letters of recommendation to students other volunteers that be used in job searches or, if they are employee volunteers, write letters of commendation to their current supervisor focused on the skills they have gained and used.

Social

- Offer teambuilding activities and opportunities to socialize informally.
- Ensure that volunteers are not just recognized by you, but that they also get acknowledgment from highly respected peers.

Idea: Appreciate Volunteers in Stakeholder Communications -- Acknowledge an individual or volunteer team of the week or month on your organization's Facebook page, in your newsletter, or on your blog.

Understanding

- Invite volunteers to staff in-service trainings.
- Offer them a variety of "stretch" assignments to explore and learn.

Idea: Invite Volunteers Take a Lead in Teaching and Learning -- Organize regular informal “teach-ins” where volunteers can share their best practices and special skills with one another. Ask volunteers to help or lead community education and volunteer orientation workshops.

Protective Motives

- Reassure volunteers that appear to lack self-confidence, or are simply going through a personal rough patch, their contributions have value.
- Ensure emotionally supportive settings for all volunteers and help them process any strong emotions related to their service.

Idea: Pamper Volunteers -- Host an annual car wash and have staff clean the cars of volunteers, or fill the volunteers’ workspace with balloons and write praise in chalk on the sidewalk in front of your building.

Enhancement

- Promote volunteer leadership development and genuine power in decision-making.
- Keep the experience positive and upbeat, even when it doesn’t feel that way to you at the moment.

Idea: Invite Volunteers to Help You Solve Big Problems -- Host idea “mash-ups” where volunteers spend time developing solutions to ongoing program or community challenges.

Retention

Sometimes we're just plain stumped as to why volunteers join and don't stay. To help you diagnose the problem, create a Volunteer Journey Map that will help with retention efforts.

- 1) **Identify your volunteer "touch points."** Write down the key moments when your organization touches the lives of new or prospective volunteers. Refer to the chart on the next page for ideas.
- 2) **Don't forget what happens before and after placement.** Consider what occurs prior to service (during your recruitment and onboarding) and after placement (when volunteers being official service and refer others to you).
- 3) **Analyze what the volunteer currently experiences at each step, both their informational needs and emotional needs.** Take a clear, objective look at each dimension of their experience including what they do, what they want to know, what drives their behavior, what they feel, and what they are missing. Focus on areas where you traditionally lose volunteers.
- 4) **Identify your gaps in supporting the needs of new volunteers at each step.** Prioritize your low-hanging fruit? Where can you gain ground quickly? Which may have a big impact on retention and deserve investment?
- 5) **Brainstorm possible improvements that can be made throughout the onboarding process.** Write down those that directly address the volunteer gaps identified in step 4.

Finally, decide how volunteer leaders and coworkers can strengthen and support your efforts. Write down specifics and possible team roles.

Volunteer Journey Map: Where Can You Improve and Optimize?

Observer (Recruitment)

- Informational Needs:
- Emotional Needs:

Inquirer (Application)

- Informational Needs:
- Emotional Needs:

Joiner (Orientation)

- Informational Needs:
- Emotional Needs:

Learner (Training for Role)

- Informational Needs:
- Emotional Needs:

Doer (Contributing Time)

- Informational Needs:
- Emotional Needs:

Evaluation

Finally, finding a way to track the results generated through volunteer effort may seem as elusive as a pink unicorn, but it's not really that complicated.

By aligning the outcomes metrics of a volunteer with the programs they are serving, you can simply and easily demonstrate why their contributions have value. Below are guidelines for developing outcome indicators that can help you track the progress of volunteer services and demonstrate accountability for results.

Formula for an Outcome Indicator

Use the following formula as an easy way to develop a SMART outcome (specific, measurable, attainable, relevant, time-bound) or key performance indicator (KPI).

**By [deadline], [percentage or raw number]
of [target population]
will [anticipated change].**

To truly track impact versus outputs, the indicators you choose should relate more to the program's ultimate effects on volunteers and those who benefit from their work and less on volunteer processes (e.g., volunteer hours or retention, which are helpful for management but don't track impact).

Here are a few examples:

- By the end of the training, 90% of participants will be able to identify at least three techniques that can lead to a successful job interview.
- Upon their hire, 48 job readiness course graduates placed in jobs will be earning at least \$15 per hour, working full time.
- At their third month of involvement, 85% of volunteers will be able to list at least three ways they feel they have made an impact in the life of a youth they have mentored.
- At their sixth month of involvement, 90% of volunteers will say that it is very likely or highly likely they would recommend volunteering with this program to friends and family.

Sample Outcome Indicators for Volunteer Effort

To keep things manageable, settle on 3-5 key outcome indicators to track and report on a quarterly basis. Below are just a few of the general possible outcomes you might track.

For Volunteers

- Volunteer satisfaction or referral rate
- % volunteers with improved skills
- % volunteers with increased confidence
- % volunteers who feel they've made an impact
- # of new volunteer friendships/professional relationships
- % increase in advocacy activities
- % increase in volunteer leaders

For Organizations/Programs

- # volunteers recruit, trained, certified, deployed
- \$ in-kind resources generated by volunteers
- \$ financial resources generated by volunteers
- % of target population aware of issue/services
- % decrease in administrative costs or increased ROI
- % grant or State Plan outcomes achieved
- # of service beneficiaries reached (or reduced wait list)
- # of earned media mentions

For Service Beneficiaries

- Increased quality of life for clients
- Client satisfaction or referral rate
- Increased health outcomes
- Decreased crisis events
- Money saved clients
- Increased feelings of wellbeing or safety
- % reduction in unemployment

There are two other ways to demonstrate volunteer impact. They are to calculate Return on Investment (ROI) and to develop and Impact Portfolio.

Calculating Volunteer Return on Investment (ROI)

Much as corporate shareholders seek positive growth in their financial portfolios, volunteers and donors want to see their investment in good causes reap rewards in the form of a social return on investment or volunteer ROI.

There are a few reasons tracking Return on Investment (ROI) is valuable:

- To more deeply assess your organization's assets and liabilities
- To justify investments in the volunteer program
- To identify specific areas for volunteer appreciation
- To demonstrate effective use of contributions
- To remove some of the guessing game & build trust

Luckily, you don't have to figure out the math. We've developed an ROI Calculator that is easy to use and computes the results for you. You can grab it for free by visiting our web page here -- <https://volpro.net/volunteer-roi/>.

Volunteer Impact Portfolios

Assembling a Volunteer Impact Portfolio is another effective way to communicate activities and impact in a meaningful way.

Because the idea is new, there are no hard and fast rules about what you should and should not include. Here are a few things you might consider including:

- A Calculation of Your Program's Return on Investment (ROI)
- Video Interviews that Share "Before and After" Stories
- A Visual Map Depicting Your Program's Journey of Change
- Simple Graphics Showing Your Program's Most Significant Outcomes
- Scanned Thank You Notes from Clients and Their Families

- News Articles That Cover Your Program's Successes
- Photos From Your Most Recent Volunteer Recognition Event
- Links to Your Most Recent Grant Report or Outcomes Dashboard

You can read more about Impact Portfolio the same place you'll find the ROI Calculator here -- <https://volpro.net/volunteer-roi/>.

Conclusion

Setting up a comprehensive system for engaging, supervising, and appreciating volunteers can feel overwhelming, particularly if you have no existing foundation to start from.

But, if you set up a plan to tackle each phase in the Volunteer Engagement Cycle, step-by-step, you'll find you'll be done in no time.

Prioritize your approach. choose the areas to address first that you feel will have the most impact and work from there. Use this eBook to get started and refer back to it along the way.

Invite volunteer leaders to be part of your development process. They are key stakeholders and are the people who will be impacted most directly by your decisions. If they have a say, they will be more likely to become active champions for change.

Finally, network with others who lead volunteers – both inside your organization and outside it – to ask questions, share best practices, collect ideas, and get recommendations on resources. By pooling your energy and collective expertise, you will save time and ramp up much more quickly than by working alone.

Best of luck as you engage the community in your important work. Involving volunteers as equal partners in mission delivery has high value for nonprofits. You'll find your focused investment of time well worth the effort.

Volunteer Management Professionals ...

- Do you worry you may not be able to meet the demand for volunteers?
- Do you struggle to get the respect you deserve?
- Would you like to be part of a community of people who understand exactly what you're going through and want to help you succeed?

Then, VolunteerPro is for you!

What is VolunteerPro?

VolunteerPro is a volunteer management training and networking hub designed to save you time and accelerate your skills and impact. We offer online courses each month that will help you offer top-tier experiences that keep volunteers coming back for more. Volunteer managers can take one webinar at a time or sign up for unlimited access as a VolunteerPro member.

Members Get Unlimited Access To ...

- Two new educational webinars per month (join live or watch recording)
- Exclusive, post-webinar live chats
- 24/7 access to our vast library of over 200 resources and recordings
- Peer networking in our private interactive forum

"Tobi always presents practical, well-researched information, without the 'fluff.' This is what sets her content apart from other webinars out there in this field. Tobi has a way of cutting straight to the point, while still being relatable and engaging."

~ Alana Knopow, MSW, Hospice of Michigan

Visit us today for more tips, tools, and info about joining:

www.volpro.net