
Community-Based Volunteer Management

*A Quick Reference Guide
for Rural Community and Economic Development Leaders*



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MAPPING the Future of Your Community Program

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Introduction

Many rural Illinois communities struggle with rising unemployment, weak manufacturing activity, and increased fiscal pressures due to stagnant state and national economies. The combination of these challenges coupled with the explosion of healthcare costs is making it extremely difficult for rural residents to improve their quality of life. Now, more than ever, communities must mobilize every available resource in an effort to overcome these challenges. The most valuable resources available to a community are its residents. When residents organize and work together to solve common problems, the results can be phenomenal.

Throughout rural Illinois, volunteers contribute valuable time, expertise, and energy to projects that benefit their respective communities. Whether they band together for community-wide clean-ups, downtown beautification, business retention and expansion, tourism development, or housing concerns, volunteers are the driving force behind rural community development. Although some communities may have full-time professional staff to lead projects, the vast majority of rural towns rely completely on part-time public officials and volunteers to get things done. Even when a paid staff is involved, volunteers play a critical role in the implementation and success of local projects.

The leaders of many communities recognize the importance of volunteers and have taken appropriate steps to build an effective local volunteer program. Yet, there are other communities whose leaders are unfamiliar with basic volunteer management skills and are unprepared to realize the full potential of their community volunteers. A common mistake is to lead the volunteer effort in an ad hoc manner that lacks clear goals, specific volunteer job descriptions, and a clearly defined volunteer management system.

This handbook provides concise, step-by-step instructions that will help lay the groundwork for an effective volunteer program. Individuals charged with managing volunteers are strongly encouraged to do further reading. References, resources, and links are located in the Appendices at the end of this handbook. A hyperlinked version of this handbook is available online at <www.iira.org>.



Chapter One

Planning for Volunteer Involvement

“By enhancing an organization’s capacity to skillfully involve community residents, we ensure that mission-focused work gets done within an accountable system and a positive, self-generating environment. This combination is what makes possible amazing, powerful results!”

—Katherine H. Campbell (UPS Foundation 2002)

The Rationale and Capacity for Volunteer Involvement

Prior to involving significant numbers of volunteers, it is prudent for a solid organizational structure and adequate planning to be in place. Some organizations recruit volunteers with little or no planning. More often than not, this action strategy leads to poor results and a negative experience for both the volunteer and the organization. According to research by the UPS Foundation (2002), “the primary reason people stop volunteering is due to poor management.” A poorly managed organization may be fraught with ineffectual meetings, and if individuals feel like nothing is being accomplished, they will rescind their offer of service. To avoid this common pitfall, an organization should begin by exploring its rationale and capacity for volunteer involvement. Consider the following questions:

- How will the involvement of volunteers help achieve the stated mission?
- Is there a budget that will support volunteer activities?
- Is there a management capacity to supervise and direct volunteer activities?
- What specific roles will volunteers play in the structure of the organization?
- Have realistic expectations of what volunteers can actually achieve been set?
- Have policies been established that will accommodate volunteer participation?
- What are the liabilities and risks of volunteer involvement?

If an organization lacks the capacity to adequately manage volunteers, it may need to do more planning. Strategic planning helps an organization prepare for volunteer involvement.

Developing a Strategic Plan

When residents first organize themselves to find solutions to common problems in a community, they usually form an informal group or committee with a low level of organization. This group almost always recognizes specific needs in the community and begins to implement projects designed to address these concerns. As the projects increase in number, scope, and complexity,

and additional people or volunteers become involved, the creation of a strategic plan becomes necessary.

The development of a strategic plan involves gathering together stakeholders, creating a shared vision, and formulating a focused mission statement that accurately describes why the organization exists. To complement the mission, meaningful projects are identified; goals, objectives, and action plans are written for each project; and a formalized leadership structure is put in place to provide oversight and management of the organization's operations.

Involving Stakeholders

Stakeholders include anyone who is a resident of a community or who is potentially impacted by a project. Therefore, it is imperative that the original group of stakeholders be representative of the entire community and includes persons with different points of view. It is a mistake to involve only people with a common perspective because persons holding different views will impede implementation of a project if they lack a feeling of ownership. It is important to deliberately involve the naysayers and the loyal opposition from the start.

Effective community development uses a diversity of ideas, opinions, and people to accomplish community goals. When seeking to involve stakeholders, use the following set of core values to guide endeavors.

Community Development Values (Littrell et al. 1992)

- People have a right to participate in decisions that affect them.
- People have the right to strive to create an environment they desire.
- People have the right to strive to reflect or modify an externally imposed environment.
- Participatory democracy is the superior method of conducting community business.
- Maximizing human interaction in a community will increase the potential for development.
- Motivation is created in people by their interaction.
- Community development is concerned with developing the capacity of people to deal effectively with their community.

Once the various stakeholders are brought together, discussions can take place, ideas can be shared, and the process of creating a shared community vision can start.

Creating a Shared Vision

A well-articulated vision helps describe the desired future state of a community. Successful communities know what they want their future to be and they work toward it. A shared vision attracts volunteers, ignites enthusiasm, and helps maintain momentum.

The strategic visioning process seeks to answer three basic questions: (1) Where are we now? (2) Where do we want to be? and (3) How do we get there? This third question sets the stage for the development of the organization's mission, goals, and objectives. Guidelines for writing a mission statement, goals, and objectives are contained in Appendix A.

Developing an Effective Leadership Structure

Organizations use many different leadership styles, models, and structures. Numerous factors will determine what works best for an organization. Effective community leaders, however, create team unity; resolve conflicts; motivate team members to achieve project goals; build positive relationships; communicate effectively; and are dependable, trustworthy, and self-aware. In the words of James Champy (2000), "One of the great things an organization can do is to help people give voice to their dreams, and provide the means by which people come together to create something greater than themselves. It is the gift of leaders to release the aspirations of others" (17).

As an organization grows in size and complexity, the creation of a formalized leadership structure is essential. The leadership structure may be as simple as a coordinating committee with a chairperson, secretary, and treasurer or it may become as complex as a nonprofit corporation with a board of directors. A nonprofit corporation promotes sustainability and places accountability in the leadership structure. Becoming a 501(c)(3) nonprofit organization is a significant step and should be taken only after careful consideration. The benefits of becoming a 501(c)(3) nonprofit corporation are listed in Appendix B. Visit www.irs.gov or contact an attorney who is familiar with incorporation procedures for more information.

Sustainability

Many community and economic development projects take months, if not years, to complete. Thus, to maintain hard-won progress, an organization must sustain its work over many years. Even so, the effectiveness of an organization may ebb and flow over time. Nonetheless, it is important to remember that the organization must continuously strive to improve its operations.

The checklist on the following page describes ten key components of a sustainable organization. This checklist provides a means for discerning whether an organization has considered the characteristics found to be present in successful organizations.

Ten Key Components of a Sustainable Organization

Key Components	Characteristics
1. Shared Vision	<ul style="list-style-type: none"> • Broadly understood • Well-articulated • Compelling • Creates excitement • Attracts volunteers, resources, money • States what the future will look like
2. Strategic Plan	<ul style="list-style-type: none"> • Focused mission • Meaningful projects • Written goals and objectives • Action Plans
3. Leadership Structure	<ul style="list-style-type: none"> • Board of Directors • Advisory Board • Executive director, president, chair, or facilitator • Treasurer • Secretary • Team leaders • Team players
4. Broad-Based Representation	<ul style="list-style-type: none"> • Leadership and membership is representative of the community • Involves people affected by the organization's activities • Does not discriminate
5. Financial Management System	<ul style="list-style-type: none"> • Budget preparation and management • Grant management • Accurate accounting • Timely financial reports • Compliance with government reporting and deadlines • A system of checks and balances • Insurance • Records management and filing system
6. Diverse Funding Streams	<ul style="list-style-type: none"> • Member contributions • Donations • Various grants • Gifts • In-kind contributions • Sponsors
7. Volunteer Management and Support System	<ul style="list-style-type: none"> • Volunteer coordination • Recruitment • Orientation • Training • Supervision • Conflict resolution system



8. Clear Lines of Communication and Continuous Improvements	<ul style="list-style-type: none">• Regular meetings• Meeting minutes• Evaluation system• Annual review• Constant feedback
9. Partnerships	<ul style="list-style-type: none">• Partnerships with other community organizations• Collaboration• Networking• Visibility• Publicity
10. Positive Organizational Climate	<ul style="list-style-type: none">• Celebrations of both major and minor successes• Safe working environment• Professional behavior

Adapted from Community Toolbox for Children’s Environmental Health (2003).



Chapter Two

Job Development, Design, and Description

“Recruiting before designing jobs is rather like trying to dance before the music begins. The possibility of ending up out of step is very good indeed.”

—Marlene Wilson (1976)

Developing Meaningful Volunteer Jobs

Once an organization has a solid leadership structure, a shared vision, a mission, and a strategic plan, job development and design can begin. The development of meaningful volunteer job opportunities is the most important part of the volunteer management process. Well-designed volunteer positions are essential for both recruiting and retaining volunteers. If an organization experiences difficulty with volunteer productivity, the source of the problem oftentimes can be traced back to inadequate volunteer position descriptions.

The Importance of Volunteer Job Descriptions

Good volunteer job descriptions clearly define the work expected of a volunteer. Accurate job descriptions allow potential volunteers to determine if a given position will be a good fit prior to accepting the assignment. Well-written job descriptions show that the organization has carefully defined, rewarding service opportunities for its volunteers. This is important because one of the worst mistakes an organization can make is to recruit volunteers and then have them stand around waiting for something meaningful to do. No one likes to have his or her time wasted.

The importance of job descriptions cannot be stressed enough. Yet, keep in mind, that some volunteer positions require elaborate descriptions while others do not. The depth of the job description should be in proportion to the skill requirements of the job. For example, highly technical positions may require more details than nontechnical positions. It is important to note that the positions assumed by board members should be covered by job descriptions.

Volunteer Policy Statement

An organization that is serious about utilizing the services of volunteers should adopt a formal policy statement showing the role of volunteers in achieving the agency’s mission and goals. According to Fisher and Cole (1993), “The organization’s policy affirms the importance of volunteers to its mission. Such strong endorsement of the involvement of volunteers inhibits

the trivialization of volunteer responsibilities and maintains respect for volunteers as integral members of the organization's staff" (31).

Sample Volunteer Policy Statement

Our organization's volunteers provide quality volunteer service to the community by addressing development issues; leading by example; and by collaborating with individuals, neighborhoods, schools, businesses, government, nonprofits, faith-based, and other community organizations that share the same goals. Volunteers allow us to expand our services and are strong representatives of our organization.

Mission-Centered Positions

Most people volunteer because they believe in what the organization does. Each volunteer position should relate directly to the achievement of the organization's mission and goals. Menial tasks will always need to be done, but to avoid volunteer burnout and turnover, provision must be made to have opportunities for volunteers that are exciting, interesting, challenging, and that actually play a part in fulfilling the organization's mission. Successful position designs can be developed following a five-step process:

1. Review the organization's mission.
2. Identify the tasks, functions, and components necessary to achieve the projects and goals of the mission.
3. Determine the personal qualities, knowledge, and skills needed to perform the tasks or functions.
4. Place the various tasks and functions into coherent and logical groups (i.e., each set of tasks should form the basis of a job that could reasonably be performed by a volunteer).
5. Formulate a complete job description that accurately reflects the aggregate tasks.

Elements of a Volunteer Job Description

A well-written volunteer job description will include the following elements:

- Name of the Organization
- Mission Statement
- Job Title—The title should capture the attention of the potential volunteer and convey the essence of what the position entails.
- Purpose—Provide a short, clear statement of the job's purpose and how the work relates to the mission of the organization.
- Job Responsibilities and Activities—Provide a detailed description of the duties and responsibilities that go along with the position.

-
- **Qualifications**—Describe the knowledge, skills, and abilities required to perform the job.
 - **Time Commitment**—List the approximate number of hours per week the volunteer is expected to work. If the volunteer must work at specific times or on certain days of the week, be sure to include that information. Clearly indicate the duration of the commitment (i.e., 2 months, 1 year, etc.).
 - **Benefits**—List any benefits that the volunteer will derive from the position (i.e., leadership experience, vocational or computer training, health insurance, etc.).
 - **Supervision**—List any reporting requirements as well as the name and title of the supervisor.
 - **Work Site**—Indicate the location at which the work will be performed.
 - **Contact Information**—Provide the name, address, phone number, and e-mail address of the contact person who will be handling inquiries about the position. Also include a website address if applicable.

The job description worksheet on the following page provides a format for preparing a meaningful job description for any position in an organization. Preparation of a job description needs to precede recruitment of volunteers.

Job Description Worksheet

Name of the Organization	
Mission Statement	
Job Title	
Purpose	
Job Responsibilities and Activities	
Qualifications	
Time Commitment	
Benefits	
Supervision	
Work Site	
Contact Information	

Chapter Three

Recruitment and Retention

“Remember that you’re not doing your organization any favors by selecting inappropriate volunteers. If the right volunteer doesn’t come along immediately, have faith and wait rather than rush someone who’s inappropriate into the position just to have it filled.”

—Kathleen Brown Fletcher (1987)

Recruiting Volunteers for Specific Positions

Prior to recruiting volunteers, the organization must have a defined mission, a strategic plan, position descriptions, and the capacity to effectively manage volunteers. Management capacity indicates that the organization has a risk management plan, personnel policies, a budget to cover volunteer and project-related expenses, and is prepared to provide training and supervision. Recruitment may begin in earnest only when these management considerations are adequately addressed by the organization.

The ultimate goal of volunteer recruitment is to match the right person to the right job. A well-written volunteer job description helps narrow the organization’s search for qualified volunteers by bringing into focus the skills necessary to do the job. Yet, skills are only part of the equation. The real challenge is to find skilled individuals who can commit the time required to do the job effectively. The single biggest barrier that prevents people from volunteering is a lack of discretionary time (Bureau of Labor Statistics 2003). When attempting to match volunteers to specific positions, it is important to recognize that different “types” of volunteers have different amounts of discretionary time available for community service.

Types of Volunteers

There are two main types of volunteers: (1) policy volunteers and (2) service volunteers. Policy volunteers serve on advisory boards, advisory committees, or on a board of directors. They are charged with the governance and administration of the organization. They formulate and carry out policies. Policy volunteers also develop, implement, and evaluate the organization’s strategic plan. Service volunteers contribute their time to the projects and goals contained within the strategic plan thereby providing a direct benefit to the community. It is possible for some volunteers to perform a mixture of both policy and direct-service functions.

Volunteers can also be categorized as long-term or short-term. Both long- and short-term volunteers play critical roles within an organization. Long-term volunteers often dedicate significant commitment, time, and energy to the “cause.” Long-term volunteers are willing to work on small and large tasks and may be involved with the organization for many years. Short-term volunteers typically desire specific assignments, usually of relatively short duration. They want to help out, but because of other commitments or interests, their involvement will be limited. Nevertheless, short-term volunteers provide indispensable service to the organization and help the organization fulfill its mission.

Recruitment Methods

Many recruitment methods can be employed to attract high-quality volunteers. The nature of the position and the type of volunteer being sought will determine which strategy to use. McCurley and Lynch (1996) identified the following types of recruitment methods:

- Warm body recruitment
- Targeted recruitment
- A combination of targeted and warm body recruitment
- Concentric circles recruitment
- Ambient recruitment
- Connecting with other groups

Warm Body Recruitment

This method of recruitment is appropriate when volunteers are needed to do a job that requires few skills or that can be easily learned. Warm body recruitment is ideal when large numbers of volunteers are needed for a short-term project. The goal is usually to attract as many volunteers as possible.

For example, a community clean-up day that involves picking up loose trash and clearing away brush from public areas might require a large number of able-bodied persons. Since few skills are necessary for this type of work, the warm body recruitment method is appropriate for this project.

Warm body recruitment involves informing the general public about the volunteer opportunity. The following are some get-the-word-out techniques:

- Word-of-mouth
- Newspaper advertisements
- Public service announcements (radio or television)
- Flyers
- Posters
- Brochures

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- Volunteer Center referrals
 - Public speaking engagements
 - Outreach to membership of professional organizations
 - Internet websites
 - Direct mail
 - Volunteer fairs

These get-the-word-out techniques can be used individually or in combination. Thought must be given to selecting techniques that are most appropriate for a given project. An organization's budget will sometimes dictate which techniques may be used. The use of direct mail, brochures, and posters, for example, can be cost prohibitive.

Targeted Recruitment

This method is used to find volunteers with specific skills for specific jobs. The goal is to recruit only the individuals who possess the specific skills needed for a particular volunteer opportunity. Plan your targeted recruitment campaign by answering the following questions:

- What type of skills and commitment are we looking for?
- Who has the skills we are looking for?
- Where can we find such individuals?
- What should be our message?
- Who is the best messenger?

For example, if an organization needs a volunteer to design a community website, then the recruitment effort can target individuals with webpage development experience. Experienced webpage developers can usually be located at high schools, community colleges, universities, or at local Internet service providers. A recruitment message should be developed that explains why the community needs a webpage developer, how the webpage developer can help, and what benefits are attached to the volunteer position. The messenger is the person who relays the recruitment message to the prospective volunteer. The messenger should be someone who is prepared to answer questions about both the organization and the specifics contained within the job description.

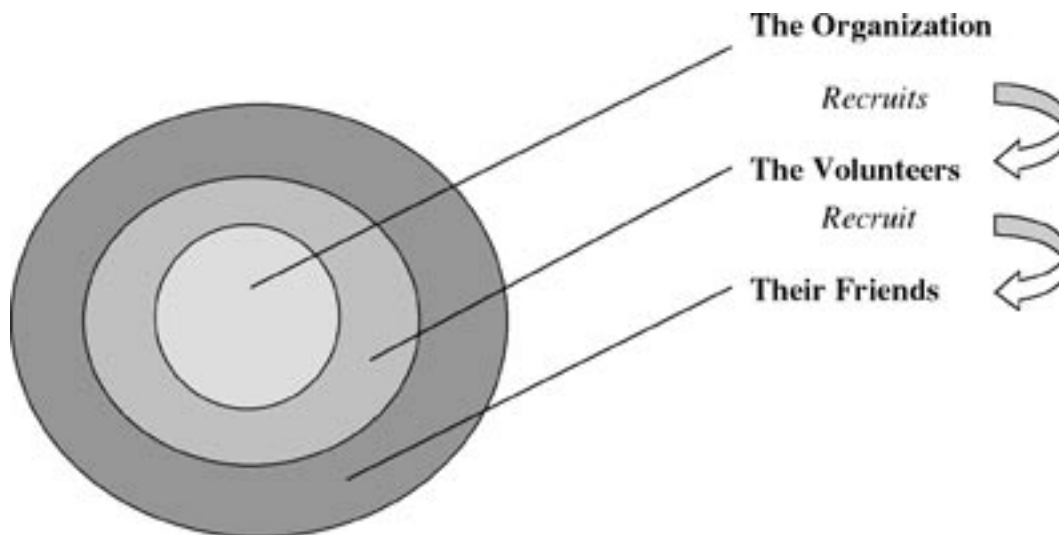
Targeted and Warm Body Recruitment

This method employs a mixture of targeted and warm body recruitment methods. Borrowing from the previous example, the targeted and warm body recruitment method could also be used to recruit a webpage designer. For instance, a get-the-word-out technique could be used to advertise the volunteer opportunity to the general public. The advertisement, however, must contain an explicit specification of skills being sought to avoid wasting time sifting through candidates that lack the qualifications for the job. Although the position announcement is

disseminated to the general public in the same manner as in the warm body recruitment method, the goal is to recruit an individual that possesses the specific skills needed for the job.

Concentric Circles Recruitment

This type of recruitment involves using the “circle” of volunteers or clients connected to an organization to assist in recruiting members of their “circle” of friends to serve. For example, this method is utilized by approaching the individuals already serving the organization and asking them for help in locating other volunteers. When prospective volunteers are approached by a friend and asked to serve, the likelihood of their saying yes is greatly increased.



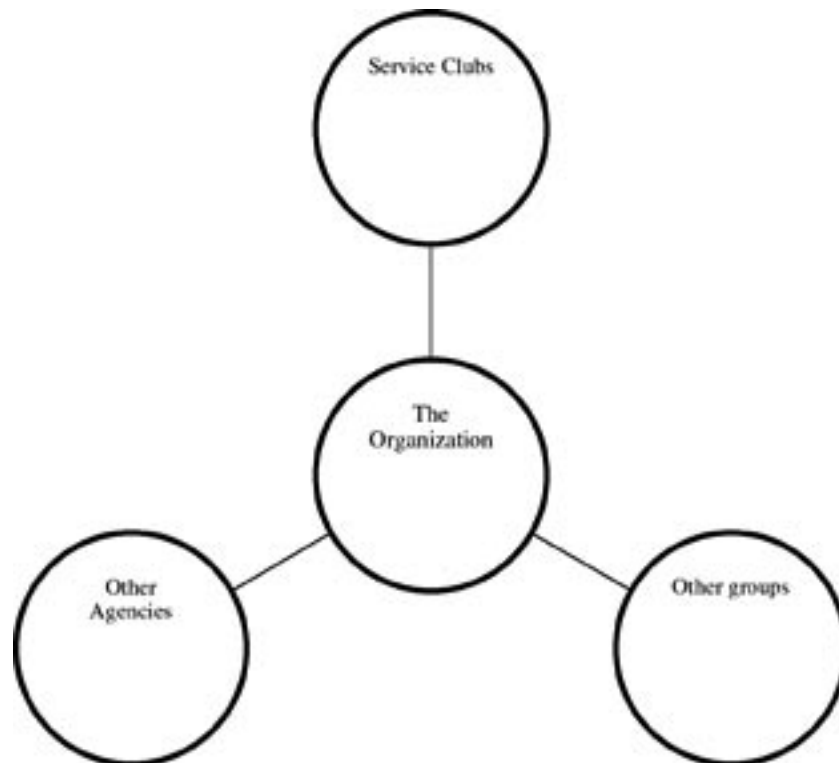
Ambient Recruitment

This method can be a potentially valuable long-term recruitment technique, especially for small communities. Ambient recruitment involves creating a service culture in a community. When community service becomes a valued part of everyday life in a community, a surplus of volunteers will be available to serve defined organizational needs. Youth brought up in a community service culture are more likely to feel strong connections to the community and, as a result, are more likely to remain in the community as adults. A community service culture can be cultivated in the following ways:

- Creating service opportunities for youth
- Encouraging families to volunteer together
- Promoting volunteerism and community service at the schools
- Constantly promoting community service

Connecting with Other Groups

This recruitment method involves partnering with service clubs and other groups in the community. These groups are filled with volunteers who may be interested in collaborating with an organization on mutually beneficial projects. This type of cross-pollination expands community networks and strengthens overall community development efforts.



The Message and the Messenger

Effective volunteer recruitment involves using the right message, delivered by the right messenger, using the right recruitment method for the right type of volunteer. No matter which recruitment method is employed, an effective recruitment message must be used. According to Stallings (1996), an effective recruitment message, at the very minimum, must contain the following elements:

- *The statement of need:* Not the organization's need, but, rather, the community's need.
- *How the volunteer can help:* Appeal by using the first person and be specific.
- *Benefits of the job:* Indicate the benefits the volunteer will derive from the experience.

The recruitment message should also indicate the date volunteers are needed and contain the phone number of a contact person so that further information may be obtained. The contact

person should be able to fully elaborate on the specific requirements and benefits of the position. Thus, the relevant job description must be prepared and available. Here's a sample recruitment message containing all of the necessary elements:

Help Landscape the Future!

Our wonderful community needs a makeover! You can help by contributing your energy and enthusiasm to an action team charged with planting trees, shrubs, and flowers downtown, in the park, and at the community entryways! Community Beautification Day is Saturday, May 15! In addition to a free lunch provided by Jericho's Pizza, you will have the satisfaction of knowing that you did your part in making our town a more beautiful place to live. Please contact Linda Rose of the Community Development Corporation at 832-4224 for more information.

Even when the recruitment message is delivered by word-of-mouth, it is important to include the essential elements of the message. Word-of-mouth recruitment messages can be an effective way to attract volunteers. Care must be taken to be inclusive. Reach out to all sectors of the community.

In essence, volunteers who believe in the organization are excellent ambassadors and advocates. Satisfied volunteers are great recruiters. If someone from the organization is designated as "the recruiter," however, it is important that he or she be knowledgeable about the organization, articulate, and widely respected throughout the community. A designated recruiter is desired when the recruitment campaign is narrowly focused in an effort to attract individuals with specific skills.

The volunteer recruitment worksheet on the next page is useful for quickly planning a recruitment campaign to fill any volunteer position.

Volunteer Recruitment Worksheet

Component	Comments
Does an appropriate job description for the position exist which will help the organization fulfill its mission?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Which type of volunteer is most appropriate for the position?	<input type="checkbox"/> Policy <input type="checkbox"/> Service <input type="checkbox"/> Short-term <input type="checkbox"/> Long-term
Which recruitment method is likely to be the most effective for filling the position?	<input type="checkbox"/> Warm body recruitment <input type="checkbox"/> Targeted recruitment <input type="checkbox"/> A combination of targeted and warm body recruitment <input type="checkbox"/> Concentric circles recruitment <input type="checkbox"/> Ambient recruitment <input type="checkbox"/> Connecting with other groups
Where can the best candidate(s) be found (e.g., universities, Internet providers, and service clubs)?	
What should the recruitment message include?	<ul style="list-style-type: none"> • Statement of need • How the volunteer can help • The benefits of the job • Date needed • Contact information
Who might be the best messenger?	
Which get-the-word-out technique(s) should be used?	
Other considerations:	

Retention

Retention is an extension of the recruitment process. Successful recruitment—in other words, matching the right volunteer to the right job—plays a significant role in volunteer retention. In addition, each element in the volunteer management process impacts retention rates. An organization that wants to retain volunteers must continuously strive to improve all aspects of its operations.

The enthusiasm of existing volunteers says a lot about the organization's management. Occasional frustration may surface from time to time in an organization's climate; however, a pervasive negativity must be corrected or changed if an organization wishes to retain the services of volunteers. A poorly managed organization with ineffective leadership will drive away volunteers faster than new persons can be recruited. Poor retention can quickly burn out the volunteers that remain. Conversely, a well-managed, dynamic organization with a positive work climate will have a relatively easy time recruiting and retaining volunteers.

Specific job descriptions are essential for the initial recruitment of volunteers. Retaining volunteers, however, involves carefully providing volunteers with increased responsibilities and personal growth opportunities. Thus, a volunteer's job must evolve over time. Very few people like to do the same thing all the time. By providing meaningful personal growth incentives to short-term volunteers, they, too, can be transformed into long-term volunteers. As the responsibilities of volunteers change, an organization needs to review job descriptions to ensure that the description is definitive of the service being provided.

Keep in mind that 100 percent retention is impossible. A variety of factors compel volunteers to move on; many of these have nothing to do with the effectiveness of the organization. Nonetheless, an organization needs to invest considerable energy into retaining top performers. Retaining volunteers reduces the time and energy otherwise spent on recruiting and training new volunteers. The institutional memory associated with the retention of volunteers also provides continuity for an organization's long-term development goals.

Tips on Volunteer Retention

- Provide opportunities for personal growth.
- Assist volunteers in gaining new skills.
- Provide opportunities for advancement within the organization.
- Match the right people with the right jobs.
- Involve volunteers in the decisionmaking process.
- Assign meaningful jobs to volunteers.
- Have clear conflict resolution procedures.
- Listen to what your volunteers have to say.
- Make volunteers feel welcome, wanted, and valued.

-
- Provide volunteers with the resources and tools to do their job.
 - Schedule time for volunteers to get to know each other socially.
 - Keep volunteers informed about the organization.
 - Keep abreast of the contributions your volunteers are making.
 - Make sure the volunteers feel appreciated.
 - Make sure the volunteers know that they are making a difference.
 - Provide regular feedback on performance.
 - Treat your volunteers with respect.
 - Provide public and private recognition to your volunteers and volunteer teams in ways that are meaningful to them.
 - Cultivate a culture of teamwork among the volunteer force.
 - Make sure the needs of the volunteers are being met.



Chapter Four

Screening and Interviewing

“Successful interviewing requires skills in relating to people and the imagination to see where their skills might best be applied. In the end, however, a successful interview will create the ideal match between the agency and the volunteer because it has defined an area of mutual interest in which both parties can benefit.”

—McCurley and Lynch (1996)

Position-Centered Screening and Interviewing

Screening and interviewing are part of a selection process that should be designed to ascertain a prospective volunteer’s motivation to serve and the extent to which he or she has the time and skills necessary to assist the organization in achieving its mission. Likewise, this selection process gives the prospective volunteers a chance to learn more about the organization thereby confirming whether or not their interests can be met by available service opportunities. Even in cases when the candidate is well-known to the organization, screening and interviewing offer the opportunity to collect valuable information that can help the organization better supervise, support, and recognize its volunteers. In essence, screening and interviewing not only aid in determining who to bring into the organization, but also assist with retention.

Application Forms

Volunteers usually learn about service opportunities through a recruitment message delivered via one of the get-the-word-out techniques. When the organization receives inquiries regarding available volunteer positions, an application form and a job description should be shared with the prospective volunteer. The completed application form normally contains the following information:

- The organization’s name, address, phone number, and, if available, e-mail address and website
- Applicant’s name, address, home phone number, work phone number, and e-mail address
- Current occupation, employer’s name, address, and phone number
- Educational background, including any special skills, certificates, or training
- The name of the position for which the applicant is applying
- Applicant’s qualifications for the position
- Applicant’s past volunteer experiences
- Motivation for applying

-
- References, complete with contact information
 - Information indicating where the applicant heard about the position
 - Considerations that are unique to the organization

The contact information and skills of applicants are important to track. A database that allows for a quick sorting of matching volunteers to skills facilitates matching volunteers to future projects and opportunities.

Screening and Risk Management

The sensitivity and skill requirements of the position determine the degree to which screening takes place. Positions that involve working with vulnerable populations such as children and the disabled are sensitive in nature, and careful screening should be documented in order to help protect the organization and clients from potential liabilities. This screening may even involve a criminal background check.

When the warm body recruitment method is used to recruit large numbers of volunteers, applications and interviews may not be feasible. It is still important to screen all prospective volunteers, regardless of their numbers, as part of a risk management process. For positions that involve strenuous labor or that have an inherent element of risk, waivers or release forms should be required. Examples of risk management forms include assumption of risk waivers and medical release forms. An attorney should examine any risk management forms used by an organization to ensure compliance with local and state laws. The last thing an organization wants or needs is a lawsuit.

Screening for Fit

In many rural communities, everyone may in fact know everyone else, so screening can be accomplished fairly quickly. Nonetheless, organizations should be selective when filling positions. Except in the case of warm body recruitment, screening usually begins with a review of the applications. Applications allow an organization to narrow the applicant pool so that only qualified candidates move on to the interview phase. This is especially important for technical positions or positions that require unique skills.

In addition, managers must determine if the applicant has the necessary discretionary time to do an effective job. There are many highly qualified people who are willing to volunteer, yet have so much going on in their lives that they simply do not have enough time to dedicate to the effort. The organization should be prepared to negotiate work schedules and assignments, however, so that otherwise highly qualified applicants can be accommodated.

Interviewing for Specific Jobs

Interviews are an essential part of the volunteer selection process. A properly constructed interview will give a volunteer an opportunity to learn more about the organization and the position, while giving the organization an opportunity to learn more about the skills, qualifications, and motivations of the candidate. Interviewing is actually part of the recruitment process. It is the organization's chance to "sell" itself to the prospective volunteer. Keep in mind that not every interview will result in finding an individual who is right for the job.

Prior to conducting the interview, candidates should know what to expect. Will the interview be one-on-one, a panel, or use some other format? At the beginning of the interview, candidates should be made to feel welcome and comfortable. Let the candidate know that the interview is a mutual exchange so that both parties can determine if the position is a good fit. Applicants should be briefed on an organization's history, mission, and projects. Candidates should be encouraged to ask questions.

Asking the Right Questions

The bulk of the interview should be focused on the details of the position and a discussion to determine if the candidate is a good fit. The position should be described in detail, including any undesirable aspects, prior to asking for a candidate to discuss their qualifications and how their qualifications relate to the position. In general, interviewers should ask questions that provide clear answers for the following categories: Motivation, Qualifications, Work Ethic, and Availability. It is important that a set of questions be developed prior to the interview. The candidate may naturally answer some of the questions during the course of the conversation. Here are some key questions for each of the categories:

Motivation

- What interests you most about the position?
- What attracted you to this organization?
- What attracts you to community volunteer work?
- How will volunteer work satisfy your sense of personal fulfillment?

Qualifications

- What type of experience has prepared you for the position?
- What skills do you have that are particularly suitable to this position?
- Based on what you know about the position, how would you go about carrying out the assignment?
- If things don't go according to plan, what would be your reaction?
- How would you describe your teamwork abilities?

Work Ethic

- Do you prefer to work alone or in a group?
- Are there any jobs you would rather not do?
- What types of work, both professional and volunteer, have you done in the past?
- What do you think are your strengths and weaknesses?

Availability

- When is the best time for you to perform the volunteer assignment?
- Would you be willing to work at other times if there was an emergency need?
- What are some of the things that occupy your free time?
- Is there anything that we could do to make it easier for you to volunteer your time with us?

After both the candidate and the organization have had a chance to ask all of the relevant questions, the interview may conclude in one of the following ways:

- Thank the candidate for their interest in the organization.
- Offer the candidate the position.
- Provide an explanation as to why the position cannot be offered to the candidate.
- Consider other volunteer service options for the candidate.
- Explain any additional procedures necessary prior to offering the position (i.e., a second interview, background or reference checks).

If it is determined that a candidate is not suitable for a particular position, perhaps there are other ways the prospective volunteer can assist the organization. In any event, potential volunteers should be treated with respect as the organization may need their services someday. Besides, the organization's ability to forge positive relationships within the community is a critical factor for long-term success. Even when a candidate is not offered a position, the individual should leave the interview with a positive impression of the organization.

When a position is offered to a candidate, it is important to make any mutually agreed upon adjustments to the job description and then have both the candidate and a representative from the organization date and sign it. Although not a legally binding document, the signed job description acts as a memorandum of agreement and fosters a sense of commitment. Once an offer has been made, the organization is ready to orient and train the volunteer.

Chapter Five

Orientation and Training

“Providing quality orientation to new employees and volunteers is critical, yet is often one of the most neglected functions in an organization. If you have taken the time to find quality people, it’s your job to make sure they fit comfortably into their new role and the organization.”

—Mary Merrill (2002)

Developing a Winning Team

Successful community-based organizations essentially are a group of residents who act and function like a winning team. Winning volunteer teams are composed of members who work well together. They share the same vision, and they contribute their valuable time and energy to the organization because they believe in its mission. Experienced coaches or leaders guide winning teams. Winning teams celebrate their victories. Yet, when setbacks do occur, team members stand together, face challenges, and continue to make incremental progress toward goals. More importantly, a winning team never gives up.

The ultimate goal of volunteer management is to create, develop, and maintain a winning team. In order for this to happen, there must be a well-designed process for the orientation and training of volunteers.

Orienting Volunteers

Each time a volunteer enters into service with the organization there is a direct impact on the interpersonal and organizational dynamics of the team. It is important, therefore, to take the time to properly orient new volunteers. Orientation serves several distinct purposes. First, it provides the new volunteer with an overview of the history, mission, projects, and accomplishments of the organization. Second, an orientation clarifies the role of the new volunteer within the organization. Third, it introduces the volunteer to the other members of the team. Finally, the orientation provides the initial training and tools a new volunteer needs to effectively begin his or her respective work assignment.

Overview of the Organization

The overview of an organization can be provided in a variety of formats. A one-on-one discussion with someone who has extensive knowledge about the organization is a good way to quickly

bring new volunteers up to speed. A group format with several speakers is a great way to present multiple perspectives on the organization while at the same time providing essential information. A combination of both formats is usually the most effective. It is important, however, not to overwhelm the new volunteer with too much information. Focus on specifics that provide a solid understanding of the organization and are directly relevant to the new volunteer's position. The goal of the overview is to ensure that new volunteers possess accurate information about the organization, its accomplishments, its challenges, and its purpose. A good overview usually contains the following items:

- Brief history of the organization
- Mission statement and goals
- Description of the projects
- Organizational Chart and contact numbers of key staff
- Discussion of the volunteer's work assignment
- Discussion of the volunteer's role within the organization
- Policies and procedures (e.g., safety, conduct, reporting requirements, recordkeeping, equipment use, etc.)
- Calendar of events, including scheduled meetings
- Tour of the facilities and equipment

Introductions

Introducing a new volunteer to other team members is a critical part of the orientation process. Introductions should be more than just learning the names of other people involved with the organization. Introductory activities should provide new volunteers with a glimpse of the organization's social atmosphere and a better understanding of how the new volunteer's role fits with those of the other volunteers.

When possible, introductions should take place when the team with whom the volunteer will directly relate is present. Often, this is done during the overview of the organization discussed earlier. When introducing new volunteers to the team, make sure you . . .

- make the new volunteer feel like a welcome member of the team.
- clarify the new volunteer's role within the organization.
- recognize and thank the volunteer for his or her decision to serve the community.
- have the existing team members introduce themselves and briefly describe their roles within the organization.

Even in cases when a new volunteer is well-known to the team, it is still important to publicly recognize the start of the volunteer's service and clarify team member roles. In addition, a new volunteer should be introduced to community partners, clients, and other citizens who the volunteer will interact with during the course of his or her service. If appropriate, consider

writing a press release to the local media introducing new volunteers to the community. This not only announces the volunteer's position, but also provides an opportunity for the organization to gain publicity.

Training Volunteers

An emphasis on training demonstrates to new volunteers that the organization is concerned with quality work. Training improves the capacity of volunteers to advance the organization and to take on new challenges. Many people choose to volunteer to acquire new skills. Providing training increases retention rates and fosters personal growth, making it a vital component of the volunteer management process. There are two general types of training: (1) induction training and (2) ongoing training.

Induction Training

Induction training involves providing the new volunteer with the information, skills, tools, and guidelines necessary to perform his or her job. The depth of the training should be proportional to the complexity of the job and the skill level of the volunteer. If the job is straightforward, requiring few skills, training may involve nothing more than a few simple directions and some basic guidelines. If the job is complicated, the training may require significant time and several practice sessions.

If the organization carefully recruits volunteers with the requisite skills to do specific jobs, training will be a smooth and fairly quick process. When volunteers are recruited to work on projects that relate to their particular area of expertise, extensive skill-based training will not be required. For example, if a volunteer with ten years of professional construction experience is recruited to build a storage shed for the community center, the individual will not need to learn how to operate tools. Yet, regardless of the skills volunteers bring to the table, volunteers will still need to know the following aspects of the job:

- How much autonomy they are allowed to exercise
- How the decisionmaking chain works
- What resources are available to help them do their jobs
- Where equipment and supplies are located
- Who they will be working with
- Who they should report to
- What their role is
- What exactly they are expected to do
- Anything else they should be aware of that could impact their ability to get the job done in the way the organization desires

When existing volunteers who are knowledgeable in specific areas can provide training in-house, the organization can bridge the gap between the skills required to do a specific job and the skills a volunteer lacks. If the skill gap is large, consider recruiting a different person for the job. Techniques for bridging skill gaps include the following:

- One-on-one coaching and mentoring—this includes guiding the volunteer, observing the volunteer perform the job, and providing feedback and analysis
- Demonstrating exactly how the skill is to be performed
- Simulating the skills necessary for the job through role-play activities
- Providing sessions that allow the volunteer to hone the skill necessary for the job

In the event a volunteer lacks the requisite skills for adequately performing the job and if training cannot be provided in-house, external training must be provided. External training usually costs money. Whenever possible, organizations should plan for and budget for external training. Inevitably, the organization will at some point need expertise from outside of the community. The goal is to acquire information and skills that build the capacity of volunteers to help them achieve the mission. External training is usually provided in the following ways:

- Attending conferences and workshops
- Taking specialized courses
- Bringing in knowledgeable experts and speakers to provide specific training
- Visiting other communities with similar projects to gain insight and skills that have been proven to produce results

Ongoing Training

Over time, the skills, abilities, and interests of volunteers, especially long-term volunteers, increase and evolve. This provides an opportunity for volunteers to take on new positions and advance within the organization. Ongoing training is a very important part of retention. Not only does training help volunteers improve their work performance, it can increase their self-worth as they increase their confidence and ability to perform new assignments. In addition, volunteers who acquire new skills increase their value as members of the team.

Ongoing training can be provided by the in-house and external methods mentioned earlier. It is important, however, that organizations budget, plan for, and schedule training on a continuous basis. Some ongoing training can be directed toward individual volunteers, whereas other training may best be directed to the entire team.

Chapter Six

Supervision and Motivation

“Organizations that allocate resources to volunteer supervision are assured a significant return on their investment because volunteer retention, customer satisfaction, and volunteer/paid-staff relations are enhanced as a result.”

—James Fischer and Kathleen Cole (1993)

Motivation and the Supervision of Volunteers

In many respects, supervising volunteers is more challenging than supervising paid staff. While there are similarities in the methods in which both staff and volunteers are supervised, there are also some important differences. Perhaps the main difference is the fact that volunteers receive no compensation.

Many people love their jobs, but few people love their job enough to do it for free. Volunteers, unlike paid employees, contribute their time, skills, and energy to a community organization without regard to remuneration. Thus, a salary is not what motivates volunteers. This fact alone makes it absolutely necessary for volunteer managers to provide high-quality supervision if they want to retain the services of volunteers. Many paid employees will accept a poor supervisor in exchange for a paycheck, but volunteers, on the other hand, confronted by inadequate supervision, will likely rescind their offer to serve and quit the organization.

One of the most important things a volunteer manager must understand is that supervising volunteers is, for the most part, a support role. The supervisor supports volunteers by ensuring that they receive a proper orientation, relevant training, guidance, and the information and resources necessary to perform their jobs. Supervisors must also conduct periodic reviews of volunteer performance and track volunteer progress. Above all, supervisors must develop a positive working relationship with each volunteer. Effective supervision requires the mastery of many different skills. Fisher and Cole (1993) state that enhanced volunteer performance can be achieved by developing the following supervisory skills:

- Creating a supportive environment
- Team building
- Delegating responsibility
- Communicating effectively
- Providing feedback

-
- Appraising performance
 - Correcting performance problems and taking disciplinary action (125)

Each of these skills requires a considerable amount of training. If an organization has trouble providing effective supervision, one might consider offering periodic workshops designed to enhance supervisory skills. A trainer that specializes in supervising volunteers should be considered.

Understanding Volunteer Motivation

The ultimate goal of volunteer supervision is to simultaneously meet the needs of the organization (achieve the mission) and the needs of the volunteer. To obtain this goal, the motivations of volunteers must be recognized and understood by supervisors in providing volunteers with effective supervision.

Extensive research on motivation has resulted in a variety of theories that help one to better understand the role of motivation in human behavior. One theory that frequently appears in the volunteer management literature is McClelland's Learned Needs Theory. McClelland (1975) identified three needs that motivate behavior: (1) the need for achievement, (2) the need for affiliation, and (3) the need for power or influence. Although each of these needs may present itself simultaneously, people will be motivated to act according to the need that they feel is the strongest at any given time.

Achievement-Oriented Volunteers

Volunteers predominantly motivated by achievement seek challenging opportunities with specific outcomes. They may be bored with easy assignments and may become frustrated with high-risk projects or projects that are slow in producing a result. They prefer difficult, but doable, assignments. These volunteers are usually well-organized, innovative, good at solving complex problems, and good planners. They sometimes become impatient if things move too slowly, however.

Community development organizations are typically comprised of a significant number of achievement-oriented volunteers. These volunteers believe in the mission and work hard to achieve it. Good jobs for achievement-oriented volunteers include the following:

- Financial management
- Fundraising
- Conducting research
- Leadership positions (committee chair or serving on the board of directors)
- Organizing training sessions
- Administrative work

Supervising Achievement-Oriented Volunteers

When supervising achievement-oriented volunteers, volunteer managers should provide regular feedback that allows volunteers to accurately gauge their performance. They are naturally driven and will work hard, but must know how they are doing. In addition, the difficulty level of their assignments should be calibrated so that the job is challenging but can be accomplished within a moderate amount of time.

Affiliation-Oriented Volunteers

Volunteers predominantly motivated by affiliation seek interpersonal relationships. They enjoy building community partnerships, alliances, and networks. Affiliation-oriented volunteers focus on the value of social relationships and enjoy working in teams. They tend to avoid conflict and conform well to group norms.

Affiliation-oriented volunteers play a critical role in the organization by cultivating relationships that promote collaboration and cooperation. They reach out to the community and are excellent at networking. They also work toward building group consensus, cohesion, and harmony. Effective jobs for affiliation-oriented volunteers include the following:

- Public relations
- Working directly with clients
- Special event planning
- Giving recognition to others
- Jobs that require close personal interaction

Supervising Affiliation-Oriented Volunteers

When supervising affiliation-oriented volunteers, supervisors should regularly provide positive feedback to reassure volunteers that they are needed. Make sure that volunteers work on tasks that require cooperation and are conducive to relationship building and social interaction. Affiliation-oriented volunteers are happiest when part of a team. They typically do not enjoy working alone.

Influence-Oriented Volunteers

Volunteers predominantly motivated by influence are directive and seek to organize the effort to achieve the mission. They work well both independently and in a group. They are strategic thinkers with a long-range vision and can open doors through political advocacy. Influence-oriented volunteers are typically decisive and can help move the organization forward when it gets stuck. They tend to seek leadership positions in the organization.

Influence-oriented volunteers play a critical role in the decisionmaking process. Often, they are the volunteers who act as the voice of the organization through public speaking engagements, press coverage, and other forums. Effective jobs for influence-oriented volunteers include the following:

- Leadership role
- Public speaking
- Political advocacy
- Committee chair
- Policy development
- Trainer

Supervising Influence-Oriented Volunteers

Influence-oriented volunteers need to be given opportunities that involve directing others. Allowance should be provided for these persons to generate new ideas and implement changes. When possible, assignments that offer an element of prestige should be provided. Menial tasks should be avoided. Provide parameters to work in, but allow influence-oriented volunteers the autonomy to get the job done in a way that they feel is right.

Keep in mind that human motivation is a complex phenomenon. The need for achievement, affiliation, and influence are all likely to exist at any given time, albeit in different quantities. The dominant need of a volunteer can change depending on the situation. Furthermore, a supervisor's motivations impact the way in which he or she supervises others. Thus, in order to be effective, supervisors must be aware of their motivations as well as the motivations of volunteers. In a general sense, understanding the motivations of volunteers enables an organization to better provide effective supervision. The supervisory skills mentioned earlier are critical to the successful supervision of all volunteers, however. A good supervisor is not recognized only by his or her own personal accomplishments, but by the success and productivity of his or her volunteers.

Chapter Seven

Recognition

“Key elements of an effective reward and recognition system are establishing clear performance goals and expectations, clearly linking individual tasks and performance to the overall organization mission, and satisfying individual needs to increase individual satisfaction.”

—E. Brian Peach and Kenneth Murrell (1995)

Recognizing Volunteers

Recognizing the contributions and accomplishments of volunteers is vital to the success of community development organizations. Volunteering should not be a thankless job, but recognition can take many forms. Recognition functions to show appreciation and gratitude for the commitment, work, and accomplishments of volunteers. All volunteers need to receive regular recognition from the start of service with the organization. Volunteer managers should make recognition a priority responsibility and develop systems to implement meaningful recognition.

Every element of the volunteer management process depends on the other elements. Recognition in the absence of good management is worthless. Thus, for recognition to carry meaning and be effective, the organization must be prepared to involve volunteers, recruit volunteers into the right positions, provide training, and provide high-quality supervision. Above all, volunteers must be treated with the respect that they deserve and they must know that they are appreciated.

There are two general categories or types of recognition: (1) formal and (2) informal. Formal recognition involves ceremonies, award dinners, or receptions that acknowledge the contributions of volunteers. Informal recognition involves a verbal or written thank you, giving volunteers positive feedback, or letting them know how their work impacts project outcomes.

Formal Recognition

Although formal recognition events can play a positive role in volunteer morale, day-to-day informal recognition is much more important. If the organization has trouble finding funding for projects, volunteers will likely perceive formal recognition events as a poor use of resources. Plaques, pins, certificates, and dinners can represent a large expense. Thus, their use should be limited. If money is a concern, but a formal event is desired, a potluck instead of a banquet might

be considered, and homemade certificates can replace plaques or funds for these items can be raised from private donors.

Informal Recognition

Informal recognition, on the other hand, is inexpensive but extremely valuable. For this reason, there is no excuse for not giving recognition when and where it is due. McCurley and Lynch (1996) developed the following ten rules for recognition:

1. Give it or else (i.e., or else you might lose the volunteer).
2. Give it frequently.
3. Give it via a variety of ways.
4. Give it honestly.
5. Give it to the person, not to the work.
6. Give it appropriately to the achievement.
7. Give it consistently.
8. Give it on a timely basis.
9. Give it in an individualized fashion.
10. Give it for what you want more of. (125)

Volunteer managers need to know how each volunteer likes to be recognized. For example, some volunteers love the limelight and crave public recognition. Other volunteers abhor the spotlight and may even feel humiliated by public forms of recognition. Consider asking volunteers how they might like to be recognized as part of the application or interview process. This information can provide some insight, but nothing can replace getting to know volunteers and recognizing them in ways that are uniquely important to each person. For many volunteers, the most meaningful forms of recognition come from their immediate supervisor, not from someone two or three rungs up the chain of command.

Recognition and Motivation

Forms of recognition or rewards that appeal to the motivational needs of volunteers can increase the meaning for the recipient. The following chart provides ideas for recognizing volunteers based on motivational orientation:

Recognizing Volunteers by Motivational Orientation

Orientation	Recognition Ideas
Achievement	<ul style="list-style-type: none"> • Give a plaque or certificate that indicates an achievement. • Assign greater responsibilities. • Provide rewarding training opportunities. • Document accomplishments and present them as a thank you.
Affiliation	<ul style="list-style-type: none"> • Provide public recognition. • Praise in front of friends and family. • Give the recognition a personal touch. • Remember birthdays.
Influence	<ul style="list-style-type: none"> • Provide recognition through the use of mass media. • Provide letter of commendation to the newsletters of other organizations to which the volunteer is a member. • Give items that carry prestige. • Allow them to represent the organization at various meetings. • Give a promotion.

The bottom line on recognition is that it must be a regular part of what the organization does and it should reward successful efforts to meet the mission of the organization. Recognition builds morale, retains volunteers, and tightens the community bond.



Conclusion

Many rural community and economic development organizations rely on volunteers to manage and implement projects. Successful organizations develop and maintain systems to effectively manage volunteers. Effective volunteer management starts with adequately preparing an organization for volunteer involvement. An organization that has a shared vision, a strategic plan, and a leadership structure with management capacity is prepared to involve volunteers.

Most people volunteer because they believe in what an organization does. Carefully defined volunteer positions that relate directly to the achievement of the organization's mission are essential for both recruiting and retaining qualified volunteers. Well-written volunteer job descriptions help narrow the search for qualified volunteers by targeting individuals with the skills necessary to do the job.

Organizations that take the time to properly screen and interview prospective volunteers ensure that both the needs of volunteers and the organization can be met prior to assigning positions. Orienting and training new volunteers helps develop and maintain an environment that fosters teamwork. Ongoing training continually builds the capacity of volunteers and strengthens the organization.

The provision of high-quality supervision is a critical component of volunteer performance and retention. Supervisors support volunteers by providing them with the guidance, information, tools, and resources necessary to perform their jobs. Effective supervisors develop a positive working relationship with each volunteer and recognize their needs and motivations.

Recognizing the contributions and achievements of volunteers is critical for the long-term success of an organization. Volunteers who feel appreciated by the organization are more likely to be satisfied and will continue to offer their services.

The most valuable resources available to a rural community development organization are volunteers. An organization with a well-managed volunteer program is better positioned to seize community and economic development opportunities and improve the local quality of life in rural Illinois.



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Appendices

- A. Guidelines for Writing Mission Statements, Goals, Objectives, and Activity Plans
- B. Benefits of Becoming a 501(c)(3) Nonprofit Corporation
- C. Links, Resources, and Further Reading



Appendix A

Guidelines for Writing Mission Statements, Goals, Objectives, and Activity Plans

(Source: *Guide to Grant Proposal Writing* [New Jersey State Library 1996])

Mission Statement

A mission statement announces to external parties the role of the organization and provides direction to volunteers and staff.

Elements of a Mission Statement

- The name of the organization
- What the organization does
- The beneficiary(s) of the organization

A mission statement is declarative and succinctly describes the purpose of the organization.

Evaluating a Mission Statement

- Is the mission statement short and focused?
- Is it easily understood?
- Does it describe why the organization does what it does?
- Does it describe why the organization exists?
- Is it broad enough to cover what the organization does?
- Is it focused enough to provide direction?
- Is it inspiring?

Goals

A goal is a broad statement which describes a desired outcome. Goals are long-range and very general.

Elements of a Goal Statement

- The affected population or user group
- The effect to be achieved
- The means by which it will be achieved

A goal should focus on outcomes: how a situation will be changed as a result of a successful project, not what a project will do.

Evaluating a Goal Statement

- Is a statement a goal?
 1. Is it long-range? Does it describe an outcome rather than an activity?
 2. Is it general? Is it a “vision” of how things will be different as a result of a successful project?
 3. Is it (to some extent) timeless? A goal does not specify a deadline for completion, nor is it necessarily achievable.
- Does the statement fit the mission of the institution?
- Does the statement relate to the project being proposed?

Objectives

Objectives are measurable results or targets to be reached on the way to a goal.

Qualities of an Objective (S.M.A.R.T.)

- It is Specific. It tells exactly what kind of, or which, problem is to be addressed.
- It is Measurable. It tells exactly how much, how many and how well the problem/need will be resolved.
- It is Action-oriented. It uses action verbs.
- It is Reasonable. It is a result that you can expect to achieve.
- It is Time-bound. It gives a specific date for its own achievement.

An objective is a milestone that measures your progress toward your goal. It is a result, not an activity.

Evaluating an Objective

- Is the statement an objective?
 1. Is it specific? Does it specify a single result to be accomplished?
 2. Is it measurable? How will you know if it has been achieved?
 3. Is it an accomplishment (e.g., does it provide, increase, establish, conduct, etc.)?
 4. Is it reasonable? Can the grantee realistically develop activities to achieve it?
 5. Is it short range? Does it include a date by which it will be accomplished?
- Does the statement support the goal? Will achieving it move the grantee closer to the outcome envisioned in the goal?
- Does the statement specify what and when and not discuss the “why” or the “how”?

Activity Plan

An activity plan is a step-by-step outline of actions to be taken to achieve objectives.

Elements of an Activity Plan

- Who will do each step
- What will be done
- When each step will be done

Action steps are specific tasks that must be done to achieve the objectives for the project.

Evaluating an Activity Plan

- Are the steps clearly stated and specific?
 1. Are they a sequential list of activities that lead logically toward the objective?
 2. Do they indicate who will be doing each step?
 3. Are they time-related? When will each step begin? How long will it probably take to complete?
- Will the activities achieve the stated objectives of the proposal?
- Are the steps realistic?
 1. Is the responsibility for doing them assigned to appropriate staff? Do they have the knowledge, skills, and abilities to perform the tasks assigned?
 2. Is the timeline realistic?



Appendix B

Benefits of Becoming a 501(c)(3) Nonprofit Corporation

- 501(c)(3) status qualifies your corporation to receive private and public grant money. If you are not recognized as a 501(c)(3), most foundations and philanthropic organizations will not allow you to submit grant proposals (requests for money).
- Contributions made to 501(c)(3)s are tax-free and exempt from federal taxation.
- Your nonprofit can continue operating in a tax-exempt status even after the original founders pass on.
- 501(c)(3) status limits liability for directors, officers, employees, volunteers, and members. This provides incentives for those asked to serve with the organization, whether on the board or otherwise.
- Corporate formalities exist that enable the organization to provide a structure for decisionmaking, especially when disputes exist between individuals about the direction of the nonprofit.
- Donors are able to make charitable contributions to your corporation and receive a tax deduction on their tax return. Donors may give property, money, stock, and services.
- Being a 501(c)(3) will qualify your corporation for participation in numerous government programs operated by state and federal agencies.
- This status provides you with cheaper advertising rates in publications.
- Lower postal rates are also charged for nonprofit corporations.
- Discounted hosting space from some Internet service providers is another advantage.
- Free radio and PSA announcements are also provided by local media.

Source: www.incorporateus.com/frequently_asked_questions_regar.htm



Appendix C

Links, Resources, and Further Reading

Links to Technical Assistance Resources in Illinois

Department of Commerce and Economic Opportunity. The Department of Commerce and Economic Opportunity is a state agency responsible for improving the competitiveness of Illinois in the global economy, resulting in prosperous, growing industries; rising real incomes; and high-quality jobs. DCEO works to provide information, assistance, and advocacy to facilitate and advance the economic development process in partnership with Illinois communities, businesses, and a network of public and private service providers.

www.commerce.state.il.us/

Illinois Institute for Rural Affairs. The Illinois Institute for Rural Affairs provides high-quality training and technical assistance to rural leaders, conducts research, and promotes statewide policies that address rural issues.

www.iira.org/

UI-Extension. University of Illinois–Extension provides practical, research-based information and programs to help individuals, families, farms, businesses, and communities in Illinois.

www.extension.uiuc.edu/welcome.html

The Governor’s Commission on Volunteerism and Community Service. Strives to improve communities in Illinois by supporting and enhancing volunteerism and community service.

www.illinois.gov/volunteer

USDA–Rural Development. USDA–Rural Development provides funding and assistance to rural communities throughout the country.

www.rurdev.usda.gov/

Web Resources

Volunteer Today. *Volunteer Today* is an e-newsletter for those who manage the work of volunteers in nonprofit, government, or corporate programs.

www.volunteertoday.com

Energize Inc. Energize Inc. is a website dedicated to those who lead volunteers.

www.energizeinc.com

The Points of Light Foundation & Volunteer Center National Network. This website promotes volunteerism and provides information and resources.
www.pointsoflight.org

Association for Volunteer Administration. This website promotes excellence in the effective management of volunteer resources.
www.avaintl.org

Charity Channel. This is a large on-line community of nonprofit sector professionals.
www.charitychannel.com

The Dorothy A. Johnson Center for Philanthropy & Nonprofit Leadership. This group provides key information to help manage nonprofit organizations.
www.nonprofitbasics.org

Board Source. This website provides excellent information for nonprofit boards.
www.boardsource.org/

Development Training Institute. This site is a source for community development leadership training.
www.dtinational.org/

Leader to Leader Institute (Formerly the Drucker Foundation). Valuable information is provided which is designed to strengthen leadership in the social sector.
www.pfdf.org/

Innovation Network. This site contains resources to help an organization evaluate its effectiveness.
www.innonet.org/

National Civic League. This is an excellent resource for strengthening citizen democracy.
<http://nclweb.org/>

Further Reading for Developing Volunteer Positions

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- Rochester, Colin. 1999. One size does not fit all: Four models of involving volunteers in small voluntary organizations. *Voluntary Action* (Spring).
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- Woodward, Allan, and Jo Kallman. 2001. Why volunteers leave: Volunteer exit survey in the emergency services. *Australian Journal on Volunteering* 6(2).

Further Reading for Interviewing and Risk Management

- American Association of Retired Persons (AARP). 1996. *Interviewing and selecting volunteers: Self-study workbook*. Washington, DC: AARP.
- Ellis, Susan, and Steve McCurley. 1998. Protection or paranoia: The realities of volunteer liability. *Journal of Volunteer Administration* (Spring).
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