VOLUNTEER PROGRAM
TRAINING GUIDE

OCTOBER 1993
PNW 428
A PACIFIC NORTHWEST EXTENSION PUBLICATION
OREGON WASHINGTON IDAHO
ACKNOWLEDGMENTS

The initial thoughts concerning this publication were discussed with Al Snider, former Extension 4-H and youth specialist at Oregon State University. Through a grant provided by the regional office of the Family Community Leadership (FCL) Program those thoughts, concerns, concepts, and principles were expanded to a 1983 publication, Volunteer Program Training Guide. Gay Gregor, Portland Bureau of Parks and Recreation, and Elaine Yandle, specialist, Oregon Department of Education, were hired to draft the materials. These materials were field tested at a conference sponsored by the Oregon Community Education Advisory Committee and involved nearly 100 community college instructors from throughout the state.

Since the initial publication is no longer in print, I initiated a new version of the Volunteer Program Training Guide in 1991. After months of research, writing, and reviews from volunteer practitioners and Extension specialists working with volunteer programs, it was accepted as a Pacific Northwest Extension publication.

I would like to express appreciation to the following reviewers: Banti Wilson, FCL volunteer; Nancy Vendelin, FCL volunteer; Mary Lee Wood, Extension specialist, 4-H and youth, and FCL state coordinator, University of Idaho; and Jan Hiller, Extension specialist, 4-H and youth, Washington State University. My thanks also to Dina Pope who spent many hours pulling together the details of this manuscript.

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VOLUNTEER PROGRAM

TRAINING GUIDE

GREG TILLSON, STATE COORDINATOR,
FAMILY COMMUNITY LEADERSHIP PROGRAM
AND VOLUNTEER DEVELOPMENT SPECIALIST,
OREGON STATE UNIVERSITY.
OCTOBER 1993
PNW 428
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A Guide for Volunteer Development in a Partnership Style

Volunteers are a tremendous resource to any group or organization. They are resource not just to be used, but to be integrated into the very fabric of the organizational system. This integration requires planning, time, sensitivity, and a certain amount of fortitude from the salaried staff as well as from the volunteer.

When this integration does take place the rewards are great, and the organization actually becomes stronger as salaried and volunteer staff prosper in a climate of mutual respect.

When it comes to involving volunteers in program support, a "we" and "they" mentality is a definite drawback. The concept of shared leadership should be incorporated in the development of a volunteer program that meets the goals of the organization, the volunteer, and the community.

This volunteer program training guide is designed for program leaders who have not yet worked with volunteers or who want to consider creative ways to include volunteers in the service delivery of their programs. The guide will also be helpful in the expansion or restructuring of an existing volunteer program. Even programs that involve small numbers of volunteers will find some sections of this guide useful.

Depletion of an organization's resources can be the result of unwise use, overuse, or neglect. This is true of any resource, including volunteers. Perhaps this manual will help your organization renew and strengthen this valuable resource.

How to Use the Training Guide

This guide addresses all aspects of volunteer program management, emphasizing the integration of volunteers into all areas of the organization. Underlying its suggestions is the authors' belief that the objectives of a volunteer program -- mutual benefit and shared responsibilities -- are achievable if salaried and volunteer staff participate equally in its planning, implementation, and evaluation.

The organization of the guide provides for flexibility. The 14 units can be presented in one continuous 2-day workshop, or related topics can be clustered for specific interests or program needs (For specific training objectives and coordinated unit clusters, review the table of workshops that follows). Each unit is a complete teaching packet with handout and supporting materials; individual units can also be used as refreshers.
Each unit contains:

- A list of the unit’s objectives
- A list of worksheets, handouts, and overheads contained in the unit
- Short introductory remarks that provide a lead-in to the unit
- A supply of handouts, worksheets, and overheads.

Have a good idea of the number of workshop participants so that you can make the appropriate number of handouts. All materials, including the overheads, were designed for copying in a copy machine.

Each unit should be modified to meet your needs. Depending on your particular instructional approach, session lengths may vary from those suggested in the lesson plans.
<table>
<thead>
<tr>
<th>Workshop</th>
<th>Objective (If you need to:)</th>
<th>Unit</th>
<th>Title</th>
<th>Estimated Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>I</td>
<td>Increase participation of volunteers in the organization</td>
<td>8</td>
<td>Motivating Volunteer Staff</td>
<td>50 minutes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>1</td>
<td>On Volunteering</td>
<td>60 minutes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6</td>
<td>Recruitment &amp; Public Relations</td>
<td>121 minutes</td>
</tr>
<tr>
<td>II</td>
<td>Improve the job performance of salaried and volunteer staff</td>
<td>5</td>
<td>Job Descriptions</td>
<td>58 minutes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>9</td>
<td>Orientation &amp; Training</td>
<td>60 minutes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>12</td>
<td>Evaluation</td>
<td>30 minutes</td>
</tr>
<tr>
<td>III</td>
<td>Improve the attitudes of staff about salaried and volunteer staff interaction</td>
<td>4</td>
<td>Rights &amp; Responsibilities/ Policies</td>
<td>80 minutes</td>
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<tr>
<td></td>
<td></td>
<td>10</td>
<td>Supervising</td>
<td>75 minutes</td>
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<tr>
<td>IV</td>
<td>Analyze the value of the volunteer program to the organization, to the volunteer</td>
<td>2</td>
<td>Assessment &amp; Goal Setting</td>
<td>35 minutes</td>
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<td></td>
<td></td>
<td>13</td>
<td>Record Keeping</td>
<td>60 minutes</td>
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<td></td>
<td></td>
<td>14</td>
<td>Program Evaluation</td>
<td>30 minutes</td>
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<tr>
<td>V</td>
<td>Learn how to keep a volunteer program healthy</td>
<td>7</td>
<td>Interview</td>
<td>110 minutes</td>
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<td></td>
<td></td>
<td>8</td>
<td>Motivating Volunteer Staff</td>
<td>50 minutes</td>
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<tr>
<td></td>
<td></td>
<td>11</td>
<td>Recognition</td>
<td>65 minutes</td>
</tr>
<tr>
<td>VI</td>
<td>Expand, refine, or redesign the volunteer program to fit needs of all involved</td>
<td>3</td>
<td>Planning a Volunteer Program</td>
<td>30 minutes</td>
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<tr>
<td></td>
<td></td>
<td>5</td>
<td>Job Descriptions</td>
<td>58 minutes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4</td>
<td>Rights &amp; Responsibilities/ Policies</td>
<td>80 minutes</td>
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<tr>
<td></td>
<td></td>
<td>13</td>
<td>Record Keeping</td>
<td>60 minutes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>14</td>
<td>Program Evaluation</td>
<td>30 minutes</td>
</tr>
</tbody>
</table>
On Volunteering

Objectives
Participants will:

- Identify characteristics of a typical volunteer population.
- List ways in which volunteers can help.
**Lesson Plan**

<table>
<thead>
<tr>
<th>Materials</th>
<th>Suggested Presentation Technique</th>
<th>Time (min.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who Volunteers, How Much, People's Opinions on Volunteering</td>
<td>MINI-LECTURE: Progressive disclosure with overheads #1, #2, and #3 (projector or flip chart)</td>
<td>20</td>
</tr>
<tr>
<td>Volunteers in Extension Activities of Extension Volunteers</td>
<td>MINI-LECTURE: Same as above (overheads #4, #5, #6)</td>
<td>15</td>
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<tr>
<td>Extension Volunteers: Who Are They?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Why are Volunteers Needed?</td>
<td>GROUP ACTIVITY: Write reasons given by participants on flip chart or overhead transparency. Summarize with the final two points as listed on the worksheet. (worksheet #1)</td>
<td>15</td>
</tr>
<tr>
<td>Where are Volunteers Active?</td>
<td>MINI-LECTURE: Same as above (overhead #7)</td>
<td>10</td>
</tr>
</tbody>
</table>
On Volunteering -- Introductory Remarks

Volunteerism is certainly not a new concept. It has a long and rich history in the United States. Most recently, President Bush defined his "thousand points of light" as "that vast galaxy of people and institutions working together to solve problems in their own backyards." In effect, he was defining any volunteer network.

Although volunteerism is a hot topic right now, it is still quite surprising that most of Americans are not volunteers. According to a 1988 survey for the independent sector by the Gallup Organization, 45 percent of Americans over 18 years volunteered in 1987. The two age groups that had the most volunteers were those people aged 45 to 54 and 65 to 74.

A recent John Naisbitt's Trend Letter suggests that volunteerism will increase significantly in the next decade. Naisbitt said that the number of adult American volunteers declined from 52 percent in 1981 to 45 percent in 1988. However, the same newsletter points out that volunteerism has risen more recently, especially among the young.

The Hudson Institute estimates that American associations donated nearly 330 million hours of their time to community service in 1989. The value of this time amounts to $3.3 billion.

A key element in developing a strong volunteer program is the identifying of persons who might want to be involved. Marlene Wilson, a nationally known consultant on volunteerism, suggests that the future is not going to be more of the present. Nor will the present necessarily be a continuation of the past. She suggests that rapid demographic changes throughout the United States will determine the pool of potential volunteers.

- For the first time ever, people over 65 out number teenagers.
- 45 percent of the population is aged 25 to 39.
  - Statistics show this group is not effectively reached by volunteer appeals.
  - 70 percent of the women in this age group work outside the home.
  - People in this age group want short assignments and flexible hours.
  - Many need a job-sharing arrangement in a volunteer position.
Marlene Wilson suggests that this age group values:

- Participative decision-making
- Teamwork
- Flexibility - not "we have always done it this way"
- Autonomy
- Close contact with others
- Ethical behavior
- Sense of humor

- There are 2.8 million people age 85 and 34,000 over age 100.
- There are 56 million baby boomers. This is the largest population segment.

These statistics suggest that demographically the United States is a maturing society. Is this reflected in your volunteer recruiting efforts?

A study of senior volunteerism completed by the Marriott Corporation and the U.S. Administration on Aging found that 41 percent of the nation’s 37.7 million seniors (60 and older) volunteered in 1990. This amounted to 3.5 billion hours of volunteer service. Another 37 percent (14.1 million) said that they would be willing to volunteer if asked. Again, do your recruitment efforts reflect this demographic change?

The study found that more seniors volunteer in the West and North Central than in the Northeast and South. Forty percent of those asked felt that all levels of government could do more to promote and provide opportunities for volunteerism.
Who Volunteers, How Much

- 54 percent of Americans, over 98 million, volunteered in 1989.
- 45 percent of Americans volunteered in 1988.
- Over 50 percent of Americans volunteered in 1981.
- Volunteers gave an average of 4.7 hours per week in 1988.
- Value of volunteer time - $150 billion in 1987.
- Value of volunteer time - $65 billion in 1981.
- People with low and moderate incomes volunteered more than those with high incomes.
- Households making less than $10,000 gave 2.8 percent of their time.
- 48 percent of contributions came from households making less than $30,000 per year.

Who Volunteers, How Much

- Households making $50,000 to $75,000 gave 1.5 percent of time.

- Households making $75,000 to $100,000 gave 1.7 percent of time.

- Households making $100,000 gave 2.1 percent of time.

- 75 percent of people felt they should volunteer last year; only 50 percent did.

- Volunteerism has a direct relationship to contributions:
  - Those who volunteer donate 2.4 percent of their income.
  - Those who do not volunteer donate 1.3 percent of their income.

- Those not volunteering were likely not asked.
People's Opinions On Volunteering

- Charitable organizations have an active role in American society.

- We need charitable organizations more now than we did five years ago.

- Those who give should be able to deduct contributions taxes.

Volunteers In Extension

- In 1983, 2.9 million individuals volunteered in Extension.

- This amounts to one out of every 80 U.S. citizens.

- Volunteers contributed more than 71 million days, or 51 days for every day invested by an agent.

- The value of the time contributed is estimated at $4.5 billion, or five times Extension’s national budget.
Activities Of Extension Volunteers

- Teaching and sharing information
  - 2.9 million volunteers shared information with 48 million people

- Community Projects
  - 558,000 volunteers involved in 189,000 community projects

- Local Organizations
  - 414,000 officers used Extension materials

Source: Steele, Sarah, 1984. Implications of Volunteerism in Extension. Department of Continuing Education, University of Wisconsin--Madison
Extension Volunteers: Who Are They?

- Extension volunteers range in age from 12 to 92.
- The majority of Extension volunteers are 30 to 50 years old, white, and female.
- The majority are employed and have some education beyond high school.
- About 33 percent serve 15 times a year, others serve year-round.
- Over 66 percent serve for more than 5 years.
- Twenty percent serve for more than 20 years.

Source: IVE Study
### Where Are Volunteers Active

<table>
<thead>
<tr>
<th>Percent</th>
<th>Subject Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>23</td>
<td>Informally/unaffiliated with organized group</td>
</tr>
<tr>
<td>19</td>
<td>Religion</td>
</tr>
<tr>
<td>12</td>
<td>Health</td>
</tr>
<tr>
<td>12</td>
<td>Education</td>
</tr>
<tr>
<td>7</td>
<td>Recreation</td>
</tr>
<tr>
<td>6</td>
<td>Citizenship</td>
</tr>
<tr>
<td>6</td>
<td>Community Action</td>
</tr>
<tr>
<td>6</td>
<td>Work-related Areas</td>
</tr>
<tr>
<td>6</td>
<td>Politics</td>
</tr>
<tr>
<td>6</td>
<td>General Fundraising</td>
</tr>
<tr>
<td>5</td>
<td>Social Welfare</td>
</tr>
<tr>
<td>3</td>
<td>Arts/Culture</td>
</tr>
<tr>
<td>1</td>
<td>Justice</td>
</tr>
</tbody>
</table>

Why Are Volunteers Needed?

1.

2.

3.

4.

5.

We have a long list of things we would like to do. If only time, resources, and expertise were available!

Involvement leads to support. People support programs they understand and in which they are involved.
Assessment and Goal-Setting

Objectives
Participants will:

- Identify needs and opportunities for volunteer service within their agency, organization, or community.
- Develop well-defined goals and objectives for their volunteer program.
- Assess how appropriate a volunteer program is to their agency, organization, or community.
<table>
<thead>
<tr>
<th>Worksheets</th>
<th>Handouts</th>
<th>Overheads</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1 Why are Volunteers Needed?</td>
<td>#1 Ten Principles of Volunteer Programming</td>
<td>#1 Preparation for Developing Goals for a Volunteer Program</td>
</tr>
<tr>
<td>#1 Wish List</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#2 Purpose, Goal, Objective Outline</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#3 Is a Volunteer Program Appropriate for My Organization</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Lesson Plan

<table>
<thead>
<tr>
<th>Materials</th>
<th>Suggested Presentation Technique</th>
<th>Time (min.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Wish List</td>
<td>GROUP ACTIVITY: Participants create a list of six things they would like to accomplish if time, money, talent, and other resources were available. (worksheet #1)</td>
<td>10</td>
</tr>
<tr>
<td>* Wish List</td>
<td>GROUP ACTIVITY: Participants rank these six items in the order of their importance or projected completion date. (worksheet #1)</td>
<td>5</td>
</tr>
<tr>
<td>Preparation for Developing Goals</td>
<td>ACTIVITY: Participants answer questions from overhead #1. Use a discussion format to generate creative thinking.</td>
<td>5</td>
</tr>
<tr>
<td>Developing Goals for a Volunteer Program</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ten Principles of Volunteer</td>
<td>ACTIVITY: Discuss each major point in participant handout #1, Ten Principles of Volunteer Programming.</td>
<td>10</td>
</tr>
<tr>
<td>Programming</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Purpose, Goal, Objective Outline</td>
<td>ACTIVITY: Participants individually complete the &quot;Purpose, Goal, Objective Outline.&quot; Have the group discuss one or more examples. (worksheet #2)</td>
<td>5</td>
</tr>
<tr>
<td>* Is a Volunteer Program Appropriate for My Organization?</td>
<td>ACTIVITY: Participants answer questions to assess whether a volunteer program is appropriate. Take a poll of responses. (worksheet #3)</td>
<td>10</td>
</tr>
</tbody>
</table>

* Make a copy for each participant.
Assessment and Goal-setting -- Introductory Remarks

Unit 1, "On Volunteering," discussed who volunteers, and why. Unit 2 will look more closely at what volunteer assistance can accomplish and whether a given agency or organization is ready for volunteers. Goals and objectives for a volunteer program are necessary prerequisites to planning. They are essential because they clarify the purpose of volunteer services and, once identified, they help ensure smooth operation. Goals and objectives also provide a gauge for measuring the success of the volunteer program.
### Wish List

What would your organization do if it had the time, money, talent, and other necessary resources?

List six things you would like your organization to accomplish if it had the resources. Then rank each from one to six based on its order of importance and/or projected time of completion. Now answer the question: Can any of these be done by a cadre of volunteers?

<table>
<thead>
<tr>
<th>Rank Number</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>[ ]</td>
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<td>2.</td>
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<td>3.</td>
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<tr>
<td>4.</td>
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<td>5.</td>
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<tr>
<td>6.</td>
<td>[ ]</td>
<td></td>
</tr>
</tbody>
</table>

Unit 2 - Assessment and Goal-setting  
Worksheet #1
Preparation For Developing Goals For A Volunteer Program

1. WHY Do You Want It?

2. HOW Will You Do It?

3. WHEN Will You Do It?

4. WHO Will Be Responsible?

5. HOW Will You Know When It Is Done?
Ten Principles Of Volunteer Programming

1. We can increase the volunteer work force if we remove barriers to volunteering. Barriers include:
   - Language differences
   - Cultural differences
   - Economic hardship
   - Physical impairment
   - Time constraints
   - Barriers to togetherness
   - Commuting distance

2. Volunteers and volunteer programs are not free. Organizations will have many costs associated with volunteer programs. Costs include:
   - Staffing
   - Recruiting
   - Training
   - Evaluating
   - Supporting
   - Supplies
   - Telephone

3. Volunteers contribute much more than is readily evident. Contributions include:
   - Helping organizations keep in touch with the community and its needs
   - Opening up new segments of the community
• Extending the ability to deliver services
• Developing an active support group
• Fundraising
• Building active advocates for the organization

4. Volunteers are professionals with skills in many areas.
   • Many are educated and highly skilled in technical areas
   • Volunteers fill positions that would not be open to salaried staff

5. Organizations that form a partnership with volunteers must meet their needs, and vice versa.
   • Volunteers are busy people and do not want to waste their time and effort
   • Volunteers are not free; organizations expect a position cost/benefit ratio

6. Do not exploit the volunteer work force.
   • Replace the words "use volunteers" with the words "involve volunteers"
   • Volunteers are resources and should be treated as such

7. Allow volunteers to serve in middle and senior management positions.
   • Develop a team approach between salaried staff and volunteer staff
   • Many volunteers are looking for new challenges and/or promotions
   • Volunteers sometimes desire experience that can be used in the job market

8. Recruit the right volunteer for the right job.
   • Do not measure success of recruitment efforts by numbers of volunteers
   • Spend time in placement of volunteers. It will pay dividends!
- Develop accurate, definitive job descriptions
- Train, supervise, and provide feedback to volunteers.
- Know what motivates your volunteers

9. The Nonprofit sector can help guide government policies on volunteerism.

10. All benefit from collaboration among nonprofit organizations.

- Ways to collaborate:
  - Volunteer referral
  - Volunteer loans and exchanges
  - Shared training
  - Recognition of each other's strengths
  - Shared infrastructure
  - Idea labs
  - Networking with other volunteers
  - Networking with other volunteer sectors (nonprofit/corporate)

---

Source: American Red Cross Volunteer 2000 study. American Red Cross, General Supply Division, 7401 Lockport Place, Lorton, VA 22079
Purpose, Goal, Objective Outline

GOAL of our organization:

How volunteers would help achieve the goal:
## Assessment and Goal-Setting

Purpose, Goal, Objective, Outline - continued

<table>
<thead>
<tr>
<th>Specific Volunteer Activity</th>
<th>How Activity Would Be Performed</th>
<th>Who Would Be Responsible</th>
<th>Due Date</th>
<th>How We Would Measure Performance</th>
</tr>
</thead>
<tbody>
<tr>
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Unit 2 - Assessment and Goal-setting  
Worksheet #2 continued
Is A Volunteer Program Appropriate For My Organization?

A volunteer program is not always feasible, and these questions should be weighed carefully before proceeding.

<table>
<thead>
<tr>
<th>Question</th>
<th>Yes</th>
<th>No</th>
<th>Changes Needed to Change No to Yes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Is there a need for volunteers?</td>
<td></td>
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</tr>
<tr>
<td>2. Can the need be translated into clearly defined jobs for volunteers?</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>3. Are salaried staff roles and volunteer roles clear?</td>
<td></td>
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</tr>
<tr>
<td>Is the salaried staff comfortable with the role of volunteers?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. Can staff be released to coordinate volunteers?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. Has salaried staff been involved in the planning?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>If volunteers are already involved informally, have they also been included in planning?</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>6. Can the tasks identified for volunteers survive turnover in volunteers?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Will uneven service delivery be detrimental?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Can salaried staff time be allocated for supervision of volunteers?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Can the agency handle supervision and training of volunteers?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Planning A Volunteer Program

Objectives
Participants will:

- Identify components of a plan for a volunteer program.
- Map out timelines for each component.
Planning a Volunteer Program -- Introductory Remarks

Advance planning is perhaps the most important step in developing a volunteer program. You need to be ready to coordinate the volunteers and to keep them interested in the job. All components of the volunteer program should be well-thought-out and, where necessary, commitments should be secured. Planning is your road map. It keeps you focused on where you are headed and shows how you will get there. Planning will help you reach your destination on time. It keeps the loss of resources at a minimum, yet maintains your flexibility. It can even suggest options for modifying your route along the way.

In its simplest form, planning is finding answers to the questions: Who? what? when? where? why? how? and how much? The volunteer program planning checklist presents some other areas to consider when you are developing a volunteer program.
Steps In Planning A Volunteer Program

1. Assessing needs
2. Adequate program planning
3. Research to determine potential volunteers
4. Developing job descriptions
5. Recruiting through advertising and promotional activities
6. Developing applications and interview schedules; determining what contracts are needed
7. Planning for orientation and training
8. Providing for volunteer motivation
9. Providing for adequate supervision and coaching
10. Providing for evaluation of individual volunteer efforts
11. Providing for volunteer recognition and rewards
12. Providing for evaluation of volunteer program effectiveness
Volunteer Program Planning Checklist

The following checklist may be helpful as you plan ways to use the community's human and material resources effectively. Remember: work creatively and be flexible.

<table>
<thead>
<tr>
<th>To Do (Date)</th>
<th>Completed (Date)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Identify needs and opportunities for volunteer service.</td>
</tr>
<tr>
<td></td>
<td>Develop well-defined goals and objectives for volunteer programs.</td>
</tr>
<tr>
<td></td>
<td>Enlist the support of the governing body and salaried staff.</td>
</tr>
<tr>
<td></td>
<td>Develop tentative written job descriptions.</td>
</tr>
<tr>
<td></td>
<td>Plan the use of various methods to recruit volunteers.</td>
</tr>
<tr>
<td></td>
<td>Organize and practice interviewing.</td>
</tr>
<tr>
<td></td>
<td>Plan orientation and training.</td>
</tr>
<tr>
<td></td>
<td>Organize a system and train staff for supervision of volunteers.</td>
</tr>
<tr>
<td></td>
<td>Develop a volunteer recognition program.</td>
</tr>
<tr>
<td></td>
<td>Design forms for written evaluations of job performance.</td>
</tr>
<tr>
<td></td>
<td>Design a system for keeping documented records of each volunteer's experience. Plan to maintain these.</td>
</tr>
<tr>
<td></td>
<td>Other:</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Unit 3 - Planning a Volunteer Program
Worksheet #1
Rights and Responsibilities/Policies

Objectives
Participants will:

- Understand the rights and responsibilities of volunteer staff.
- Understand the rights and responsibilities of salaried staff.
- Be able to identify rights, responsibilities, and other program considerations for their organization.
Lesson Plan

<table>
<thead>
<tr>
<th>Materials</th>
<th>Suggested Presentation Technique</th>
<th>Time (min.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Volunteer Policies and Regulations - Sample</td>
<td>GROUP ACTIVITY: Discussion of policy sample provided and others solicited from participants. (handout #1)</td>
<td>15</td>
</tr>
<tr>
<td></td>
<td>Informal polling and discussion of following questions:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1. Does your agency have a written policy pertaining to volunteers?</td>
<td>20</td>
</tr>
<tr>
<td></td>
<td>2. If so, what form is it in and where would it be found?</td>
<td>10</td>
</tr>
<tr>
<td></td>
<td>3. How could the handout examples be modified to fit your organization?</td>
<td>10</td>
</tr>
<tr>
<td>Rights and Responsibilities of Volunteers</td>
<td>MINI-LECTURE: Progressive disclosure with overhead or flip chart. (overheads #1 and #2)</td>
<td>10</td>
</tr>
<tr>
<td>Rights and Responsibilities of Salaried Staff</td>
<td>MINI-LECTURE: Same as above. (overheads #3 and #4)</td>
<td>10</td>
</tr>
<tr>
<td>Ten Commandments for Volunteers and Salaried</td>
<td>MINI-LECTURE: Group discussion. (handout #2)</td>
<td>5</td>
</tr>
<tr>
<td>Staff</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Make a copy for each participant.
**Rights and Responsibilities/Policies -- Introductory Remarks**

If volunteer staff and salaried staff agree on the same set of standards, misunderstandings and conflicts can be avoided. To prevent confusion, both need to know their rights and responsibilities while undertaking a volunteer program. This knowledge will also help develop a team spirit. Full discussion of policy considerations by volunteers and those who administer the volunteer program will create goodwill and consistency.
Volunteer Policies and Regulations

Policy Statements:

1. Citizens who volunteer their time and talents are valuable assets to Salem School District 24J. The Board of Directors encourages constructive participation of groups and individuals in local schools, district offices, and programs, to perform appropriate tasks before, during, and after school hours, under the direction, training, and supervision of District personnel. Some community volunteers (e.g., advisory committee and parent club members) would not work under the direct supervision of staff; however, they would work closely with staff to ensure communication and cooperation with all District-related activities. The Board believes that community volunteers enrich educational opportunities for students, promote a positive school environment, and improve school and community relations.

2. The Superintendent will develop administrative regulations to implement this policy, and will provide guidelines for the management of the program, including the recruitment and training of staff in working with volunteers.

3. The Board encourages administrators, teachers, and classified staff throughout Salem School District 24J to provide students with the services of volunteers as part of the educational team.

Implementation Regulations:

1.01 Recruitment.

1.01.01 Volunteers may be recruited for any purpose that is in accord with District policies and regulations, and is approved by the department supervisor or principal.

1.01.02 Recruitment procedures may be established at the school level or by groups of schools.

1.01.03 Recruitment may include District-wide promotions, and may be in cooperation with other volunteer agencies in the city and state.

1.01.04 Volunteers will receive no District remuneration other than reimbursement for expenses incurred at the direct request of the volunteer's supervisor.
1.02 Training for Volunteers and Staff.

1.02.01 Volunteers involved in short-term activities, such as fund-raising events or health checks, will receive training as needed regarding their assignment, conduct, and school rules.

1.02.02 During activities in which students benefit from volunteers performing vital roles on a long-term basis, such as assistance in classrooms, media center, offices, cafeterias, playgrounds, etc., the principal, volunteer coordinator, teacher, or assigned administrator will be responsible for informing and training the volunteer in these areas:

- 1.02.02.01 Appropriate District policies and regulations.
- 1.02.02.02 Emergency and safety procedures.
- 1.02.02.03 Confidentiality rules.
- 1.02.02.04 School routines.
- 1.02.02.05 Position's role and responsibilities.

1.02.03 The principal, department supervisor, or principal's designee is responsible for training all staff members in the effective use of volunteers.

1.02.04 Volunteer Services will provide assistance in all training areas which are within District budgetary allocations as requested by school administrators. Special requests should be referred to Volunteer Services.

1.02.05 Volunteer Services will provide general training for volunteers who desire training for future volunteer activities in the public schools or other District programs.

1.03 Public Relations.

1.03.01 The media will be used to solicit volunteers.

1.03.02 Volunteer Services is responsible for providing information about volunteer programs to parent groups, senior citizen groups, and other appropriate agencies and organizations to recruit volunteers.

1.04 Evaluation.

1.04.01 The volunteer program will be evaluated annually by Volunteer Services. The number of volunteers used in the program, and the quality of services rendered through the volunteer program, will be evaluated. By June 15, Volunteer Services staff will prepare an annual report to the School Board, which will review the District volunteer program. The report may be presented to the Board at their request.
Rights of Volunteer Staff

1. To be treated as co-workers, not as free help.
2. To have a suitable and worthwhile assignment.
3. To know about the organization - its policy, people, and programs.
4. To participate in activities.
5. To receive quality training.
6. To receive guidance and direction when needed.
7. To have proper working conditions.
8. To be exposed to a variety of experiences.
9. To be heard, and to have a part in planning.
10. To be recognized through promotions and rewards.
11. To receive day-to-day expressions of appreciation by professionals.
12. To have volunteer time used wisely.
13. To receive prompt response and feedback.
14. To receive prompt return of phone calls.
15. To have risks explained.
Responsibilities of Volunteer Staff

1. To accept only realistic assignments.

2. To respect confidences.

3. To respect professional attitudes, methods, etc.

4. To follow the rules.

5. To state his/her limitations.
Rights of Salaried Staff

1. To decline the services of unacceptable volunteers.

2. To have agreed-upon deadlines met.

3. To expect sensitivity to organizational problems.

4. To be told the limitations and expectations of volunteers.

5. To expect that volunteers will communicate with salaried staff.
Responsibilities of Salaried Staff

1. To provide or negotiate an accurate job description.
2. To prepare salaried staff.
3. To prepare all participants.
4. To offer a program of training and supervision.
5. To be ready to place the volunteer.
6. To treat volunteers as co-workers, with acceptance and trust.
7. To avoid confusing jargon.
8. To give the volunteer a significant task.
9. To keep the volunteer informed.
10. To give the volunteer proper recognition.
11. To evaluate performance with the volunteer.
12. To provide opportunities for the volunteer’s personal growth.
13. To advise the volunteer of risks inherent in the job.
Ten Commandments for Volunteers and Salaried Staff

**For Volunteers**

1. Know your job.
2. Allow for training; contribute expertise.
3. Take jobs that interest you.
4. Serve faithfully; offer insights.
5. Become familiar with the entire organization.
6. Be open to new responsibilities.
7. Share the community's needs with the organization.
8. Be open to self-evaluation.
9. Be loyal in your volunteer activities.
10. Take pride in your volunteer activities.

**For Salaried Staff**

1. Be honest about what the job is.
2. Train and supervise the volunteer.
3. View the volunteer as a resource, not as an object.
4. Communicate effectively. Don't use jargon.
5. Place the volunteer soon after recruitment.
6. Provide significant work for the volunteer.
7. Volunteers are non-salaried staff; keep them informed.
8. Evaluate volunteer activities.

---

Source: Adapted from materials presented at a Marlene Wilson, at seminar, Albany, OR.
Job Descriptions

Objectives
Participants will:

- Be able to understand why job descriptions are necessary.
- Know what should be included in a job description.
- Know how to create a job description that matches the task.
<table>
<thead>
<tr>
<th><strong>Worksheets</strong></th>
<th><strong>Handouts</strong></th>
<th><strong>Overheads</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>#1 Writing a Job Description</td>
<td>#1 Why Are Job Descriptions Necessary?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>#2 What Should Be Included in a Job Description?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>#3 Sample Job Description</td>
<td></td>
</tr>
<tr>
<td></td>
<td>#4 Volunteer Job Description</td>
<td></td>
</tr>
<tr>
<td></td>
<td>#5 Job Descriptions</td>
<td></td>
</tr>
</tbody>
</table>

**Lesson Plan**

<table>
<thead>
<tr>
<th>Materials</th>
<th>Suggested Presentation Technique</th>
<th>Time (min.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Why Are Job Descriptions Necessary?</td>
<td>MINI-LECTURE: Discuss handout and ask participants to add to the list. (handout #1)</td>
<td>10</td>
</tr>
<tr>
<td>* What Should be Included in a Job Description?</td>
<td>MINI-LECTURE: Same as above. Show sample. (handouts #2 and #3)</td>
<td>10</td>
</tr>
<tr>
<td>* Sample Job Description</td>
<td>GROUP ACTIVITY: Discussion: Have participants list tasks appropriate to a volunteer position in the participant's agency or organization.</td>
<td>10</td>
</tr>
<tr>
<td>None</td>
<td>ACTIVITY/DISCUSSION: Participants use the worksheet for writing a job description. Allow 15 minutes. Share samples and discuss with group. (worksheet #1)</td>
<td>25</td>
</tr>
<tr>
<td>Volunteer Job Description</td>
<td>ACTIVITY: Handouts #4 and #5 provide examples of other formats for job descriptions. Review quickly.</td>
<td>3</td>
</tr>
</tbody>
</table>

* Make a copy for each participant.
Putting job descriptions in writing has merit for several reasons. It forces you to take a serious look at the positions you intend to fill with volunteers. Before you can write a job description, you must evaluate your own expectations, time frames, and ability to fulfill your part of the contract. A volunteer who reads a job description knows that thought and planning have preceded the recruitment activity. This awareness is important to the success of your volunteer program -- it makes volunteers feel that they are a valuable part of the team.

The job description is especially helpful for the volunteer. It provides a guide for day-to-day duties and responsibilities, and clarifies staff's role and expectations. It acts as a foundation for training, supervision and evaluation. It clarifies staff's role and expectations. The job description is also a useful tool in recruitment and interviewing activities because it clearly describes the job requirements and the qualifications of the person needed to fill the position.

A job description in many ways acts as the agreement or contract between the volunteer and your program. It protects the volunteer's rights and gives you a basis for approaching a volunteer who is not living up to his or her responsibilities. It is important that the job description be as explicit as possible. It is equally important that the description be open to change or periodic revision with input from the volunteer. A job description is also important in risk management activities. It spells out what a volunteer can and cannot do and it defines expectations.
Why are Job Descriptions Necessary?

Job descriptions:

1. Encourage you to look seriously at the position and provide an opportunity to evaluate your expectations, time frames, and ability to fulfill both parts of the contract.

2. Provide the basis for volunteer recruitment efforts.

3. Assure the volunteer that all aspects of the position have been carefully explored, planned for, and approved.

4. Assure the volunteer that you really need someone to do the job.

5. Act as an agreement or contract between the volunteer and your program.

6. Protect the volunteer and the organization.
What Should be Included in a Job Description?

1. **Job Title:** Important because it adds dignity to any job.

2. **Time Requirements:** Is it a short-term or ongoing job? What do you mean by "ongoing"? Give dates if possible, e.g., through spring quarter. Indicate specific days and hours, or that the schedule is flexible; list time lines, if relevant.

3. **Job Site:** Address, telephone number, bus line(s).

4. **Supervisor:** Title, telephone number.

5. **Position Responsibilities:** Include the purpose of the job, its relation to the overall program and its specific objectives. List the duties of the job and special requirements, e.g., assertiveness, confidentiality, collaboration.

6. **Skills and Education:** List skills, training, and experience necessary for the job. If there is a minimum age or driver's license/vehicle required, indicate that here.

7. **Training:** List type of training you will offer and how it will be provided. Examples: "Regular inservice for volunteers in this category," or "training will be conducted on a one-to-one basis."

8. **Tools, equipment, etc.:** If you expect volunteers to use tools or equipment to do the volunteer job, list them and any special knowledge or ability that is required.
Sample Job Description

Title: OSU Extension Family Community Leadership Trainer
Location: _____________ County
Rank: Volunteer

Job Description:

* Volunteers will work in cooperation with county and state offices of the Family Community Leadership Program.

* Volunteers will receive a minimum of 30 hours of training designed to enable them to give families skills for analyzing social issues and getting involved in public decisions, particularly those concerning the family. In addition, they will receive continuous updating of resource materials during their commitment year.

* Volunteers may be asked to train other groups and organizations primarily during fall, winter, and spring.

* Volunteers will receive a certificate indicating completion of a state training program.

Responsibilities:

* May serve as a resource and training person for public policy education events in the local community.

* May assist in organizing and carrying out local (state) activities that are related to public policy education.

* Work as a team member with other Family Community Leadership trainers and county Extension agents that are located in project counties.
Qualifications:

- Willingness to assist in providing the public with educational opportunities in public policy training.
- Ability to communicate well with others.
- Commitment to following OSU Extension Service educational procedures when training groups through the Family Community Leadership project.
- Interest in helping families understand the social and economic issues that directly affect them.

Benefits:

- Receive intensive training in issues identification and analysis, public policy formulation, leadership skills, and training methods.
- Opportunity to meet and work with participants within the state and the region (Oregon, Washington, Alaska, Hawaii, Colorado, New Mexico).
- Expenses paid for three-day training in Newport, Oregon.
- Watch growth of participants, skills and increase in public policy participation as a result of the program.
Family Community Leadership
Trainer Commitment

Project Description:

The Family Community Leadership trainer will be a voluntary member of a team of individuals from each project county. The volunteers will assist county Extension staff in planning and delivering training in public policy education. The training will be designed to give families skills for analyzing social issues and getting involved in public policy decisions, particularly those concerning the family.

As a Family Community Leadership trainer in ________________ County I am willing to:

1. Participate in a three-day state training workshop to be held in ____________
2. Attend a one-day orientation session on __________________________
3. Follow the education "charge" principle established by the statute that governs the Oregon State University Extension Service
4. Share accurately the concepts and information with people without regard to their race, color, national origin, or sex
5. Work as a team member with other public policy Family Community Leadership trainers and county Extension Service staff
6. Volunteer an equivalent of two days a month in receiving /giving training for one year. Days can be arranged according to local needs

Signed ___________________________ Date __________________

Unit 5 - Job Descriptions
Handout #3 continued
Writing A Job Description

Name of Agency

1. Job Title:
2. Time Requirements:
3. Job Site:
   Address:
   Phone:
4. Supervisor:
5. Position Responsibilities:
6. Basic Skills or Education Required:
7. Training Provided:
8. Tools, etc.
9. Requested by: ___________________________ Date ______________

Unit 5 - Job Descriptions  Worksheet #1
Volunteer Job Description

Department: ____________________________

Agency or Unit: ____________________________

Address: ____________________________ Telephone: ____________________________

Immediate Supervisor: ____________________________

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
</tr>
</thead>
</table>

**VOLUNTEER JOB TITLE:** ____________________________

- Duties and Responsibilities (e.g., nature of duties, with whom, how long, where)

- Desired Qualifications (e.g., related previous experience and/or training)

- Special Skills, Certification Required (e.g., CPR, Life saving)

**OTHER INFORMATION:**

- Days and Hours Needed: ____________________________
- Minimum Length of Service Required: ____________________________
- Other Comments: ____________________________

**VOLUNTEER TO BE SUPERVISED BY:** ____________________________

**VOLUNTEER TO BE REFERRED TO** (if other than supervisor):

Name: ____________________________ Title: ____________________________
Telephone: (___) ____________________________

**NUMBER OF VOLUNTEERS NEEDED:**

---

Unit 5 - Job Descriptions

Source: State of Hawaii, Sample job description
Job Description Worksheet

Position title: 

Advisor: 

Directly responsible to: 

Purpose: 

Benefits of the position: 

Major duties: 

Skills needed: 

Term: 

Time involved: 

Training: 

Support (Extension Office privileges): 

Expectations (As a result of this position I would like to see): 

Unit 5 - Job Descriptions 

Source: Mary Lee Wood, Extension FCL Coordinator, Idaho Extension
Recruitment and Public Relations

Objectives
Participants will:

- Become aware of the profile of a typical volunteer.
- Prepare a recruitment plan for one volunteer job they must fill.
- Practice preparing press releases to advertise volunteer job openings or program events.
<table>
<thead>
<tr>
<th>Worksheets</th>
<th>Handouts</th>
<th>Overheads</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1 Individual Recruitment Plan</td>
<td>#1 The Job Description as a Request Form</td>
<td>#1 How to Write a Press Release</td>
</tr>
<tr>
<td>#2 How to Write A Press Release</td>
<td>#2 Non-volunteers</td>
<td>#2 Non-volunteers</td>
</tr>
<tr>
<td>#3 Ten Suggestions for Getting Along With the Mass Media</td>
<td>#3 Recruiting: Where and How</td>
<td>#3 Recruiting: Where and How</td>
</tr>
<tr>
<td>#4 Self-assessment Form to Volunteers</td>
<td>#5 Ten Recommendations for Volunteers</td>
<td>#4 Self-assessment Form to Volunteers</td>
</tr>
<tr>
<td>#6 A Public Relations Primer</td>
<td>#6 A Public Relations Primer</td>
<td>#6 A Public Relations Primer</td>
</tr>
<tr>
<td>#7 Creative Ways to Recruit Volunteers</td>
<td>#7 Creative Ways to Recruit Volunteers</td>
<td>#7 Creative Ways to Recruit Volunteers</td>
</tr>
<tr>
<td>#8 Why Some People Don't Volunteer</td>
<td>#8 Why Some People Don't Volunteer</td>
<td>#8 Why Some People Don't Volunteer</td>
</tr>
<tr>
<td>#9 Volunteer Life-Cycle</td>
<td>#9 Volunteer Life-Cycle</td>
<td>#9 Volunteer Life-Cycle</td>
</tr>
<tr>
<td>Materials</td>
<td>Suggested Presentation Technique</td>
<td>Time (min.)</td>
</tr>
<tr>
<td>----------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>* The Job Description as a Request Form</td>
<td>MINI-LECTURE: Use handout #1. Discuss who initiates request, e.g., staff who will supervise those volunteers, and the importance of a complete job description agreed upon in advance.</td>
<td>10</td>
</tr>
<tr>
<td>Recruiting: Where and How</td>
<td>MINI-LECTURE/DISCUSSION: On flip chart or overhead, list different sources of volunteers and have participants identify recruitment techniques appropriate for each group. Brainstorm.</td>
<td>5</td>
</tr>
<tr>
<td>* Individual Recruitment Plan</td>
<td>ACTIVITY: Participants individually prepare a plan for filling a volunteer position in their own organization. In groups of two or three, participants review their plans. (worksheet #1)</td>
<td>15</td>
</tr>
<tr>
<td>How to Write A Press Release</td>
<td>MINI-LECTURE: Use overhead #1 to review the press release format. Talk about other options (public service announcements, etc.).</td>
<td>10</td>
</tr>
<tr>
<td>* Press Release blank form</td>
<td>GROUP ACTIVITY/DISCUSSION: Each small group drafts a press release for one position. If time allows, read recruitment plans and press releases to entire group and give participants an opportunity to react to each. (handout #2)</td>
<td>15</td>
</tr>
<tr>
<td>Non-volunteers</td>
<td>ACTIVITY: Make the point very clear as to why people do not volunteer. Reinforce recruitment. (overhead #2)</td>
<td>1</td>
</tr>
<tr>
<td>Recruiting: Where and How</td>
<td>ACTIVITY: Discuss the overhead on recruiting: where and how. Use to start creative recruitment thinking. (overhead #3)</td>
<td>5</td>
</tr>
<tr>
<td>* Ten Suggestions for Getting Along with the Mass Media</td>
<td>MINI-LECTURE: Summarize and distribute copies. (handout #3)</td>
<td>10</td>
</tr>
<tr>
<td>* Preparation for Recruiting</td>
<td>GROUP DISCUSSION: Involve group in discussing handouts #4 to #10. Self-assess what handouts should be covered in detail.</td>
<td>30-50</td>
</tr>
</tbody>
</table>

* Make a copy for each participant.
Recruitment and Public Relations -- Introductory Remarks

It is difficult to separate volunteer recruitment from public relations. They both go hand-in-hand. A good ongoing plan to make and keep the public aware of your program will reinforce any recruitment efforts you undertake. Methods for volunteer recruitment are many and varied. There is no single way that is right. However, it is true that the best volunteer recruiters are happy, contributing volunteers.

Know your audience and be prepared to state your program’s needs in a way that demonstrates an understanding of the needs of the potential volunteer as well. Organizations must believe that they can control their destiny in terms of recruitment activities. They will not survive if they believe they are victims of forces beyond their control.

In the recruitment process, it will be important for volunteers to assess what they are qualified to do. That will help in the eventual placement of volunteers.

It is important to remember that there are many ways to recruit volunteers. Do not concentrate all your efforts on one activity. For instance, news and press releases are but one way to recruit. Paid advertisements, company newsletters, word of mouth, friends of existing clientele, etc. are also important.
The Job Description as A Request Form

Request Date:
Division: Program/Dept.:
Contact Person: Phone:
Address:
Type of job (circle one): Ongoing Special Project/Event Seasonal

Project or Position Title:
Position Description:

Special Skills, Abilities and/or Equipment Needed:
Job Site & Address:
Training to be Provided:
Risks Involved:
Duration--List days and times volunteers are needed:
Other Comments:

<table>
<thead>
<tr>
<th>Date</th>
<th>Notes, Comments, Referrals</th>
</tr>
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<tbody>
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Unit 6 - Recruitment and Public Relations  Handout #1
Individual Recruitment Plan

Position Title: __________________________________________________________

Job Description: ________________________________________________________

Skills/Equipment Needed: ________________________________________________

Duration: (Days and times? How long? Flexible?)

______________________________________________________________

______________________________________________________________

Other comments: ______________________________________________________

Potential Source of Volunteers for this Position

<table>
<thead>
<tr>
<th>Potential Source of Volunteers</th>
<th>Appropriate Recruitment Method</th>
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<tbody>
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</table>
How to Write a Press Release

Date:

Title:
Contact Person:
Phone Number:

Release Date:

Kill Date:

Title or Headline:

What:

When:

Where:

Details:

Cost:
How to Write a Press Release

Date:
Title:
Contact Person:
Phone Number:
Release Date:
Kill Date:
Title or Headline:
What:
When:
Where:
Details:
Costs

- 30 -

NOTES:

• Use your own letterhead (or 8-1/2 x 11 quality paper) and keep a copy.

• Always double space (or put 1-1/2 spaces between lines).

• The information included in your press release can be presented in the form of a list or an article. However, if you write an article, put the basics in the first paragraph. Often, in the editing process, the last paragraph or two will be cut. If you list your vital information last, it may be left on the newsroom floor.

• The "-30-" indicates the end of the press release. If you continue on to a second page, you should put "more" at the bottom of the first page and "page 2" on the bottom of the following page.

• Be precise in giving addresses, telephone numbers and dates.
Ten Suggestions for Getting Along With the Mass Media

All news media today operate under intense pressure. Every day they receive a flood of press releases, handouts, pictures, booklets, reports, government papers, periodicals, business forecasts, wire copy and local copy. All must be edited to fit into so many columns of newspaper space or so many minutes of air time.

Any public relations man or woman who makes it a little easier to find information of interest to readers or viewers has a friend in the media.

Here are 10 suggestions which should help you win friends in the mass media.

2. Do not include a lot of repetitious or unnecessary information.
3. Write simply and clearly. Don't worry about style; all media rewrite to fit their own needs. Just make sure all the information is there.
4. Type it, double-spaced. If you don't type, find someone who does. Never submit a release written in long hand.
5. If you know who handles the subject matter of your release, send it directly to that person. Otherwise, address the envelope to the editor or news director.
6. Know and comply with the deadlines for spot news copy.
7. Time your release for one to two weeks before of the event for daily newspapers and broadcast stations.
8. Always include the following information in every press release:
   a. The name of the group or organization sending it
   b. A name and telephone number to be contacted for further information
   c. A release date and time (e.g., "For release in evening editions and newscasts, Thursday, Dec. 4")
   d. A statement that the item is of local interest

9. Think of a news angle or a reason for the publicity. For example: The visit of a notable person; the hiring, promotion, resignation, or retirement of staff; the opening of a new program, a new piece of equipment, a change in your budget, getting a grant; election of officers; a special award or scholarship; any first or exceptional achievement of your group.

10. Get to know the reporter who is assigned to cover the subject area of your organization and establish a friendly relationship.
Non-Volunteers

80 percent
of those who did not volunteer
cite as the primary reason
the fact that
they were not asked!

Recruiting: Where and How

Source of Volunteers       Appropriate Recruitment Device

1. Some Volunteers Are Right Under Your Nose!

2. Some May Want to Volunteer for Credit—High School or College

3. General Public
   - target: identifying a segment of the general public may be more effective than a shotgun approach
Self-Assessment Form for Volunteers

Volunteering should be a mutually rewarding experience for both you, as the volunteer, and the organization for which you have chosen to work.

The first step in finding a suitable volunteer position, or in reassessing your present one, is to take a look at yourself. An evaluation of yourself and your position may help you reap greater benefits from those hours spent in your volunteer work. This assessment is designed to guide you in doing your part to assure a successful volunteer placement.

1. Think about yourself and determine what MOTIVATES you to want to share your time as a volunteer. Check the statements that apply to you:

   _____ I want to learn skills related to my career
   _____ I want to help others
   _____ I want to use the extra time I have in a worthwhile way
   _____ I want to meet new people and be in a different setting
   _____ I want to get involved in the community
   _____ I want to support an issue which concerns me
   _____ I feel a sense of duty (e.g. relative is involved in the program)
   _____ I couldn't refuse when asked
   _____ I want to follow up on a personal interest
   _____ I want to learn specific skills. What skills?__________________________

   _____ Other (Please describe):__________________________

2. How many HOURS PER WEEK could you spend as a volunteer?

   Maximum No. of Hours_________ Minimum No. of Hours____

3. WHEN are you available?

   _____ Weekdays       _____ Mornings       _____ Other (please describe)
   _____ Weekends       _____ Afternoons      _____ Evenings
4. Do you DRIVE and/or have access to a car or some form of transportation?
   _____ Yes _____ No

5. Do you have any PHYSICAL LIMITATIONS which might affect the work you can do?
   _____ Yes _____ No
   If YES, please explain: ____________________________________________
   ____________________________________________
   ____________________________________________

6. Do you PREFER to work:
   _____ At a task which does not involve direct contact with agency clients?
   _____ Directly with agency clients?

7. What SIZE GROUP of agency clients do you prefer to work with?
   _____ One-to-One _____ Small Groups _____ Large Groups

8. With which AGE GROUPS are you most comfortable with?
   ____ Infants (2 and under) ____ Children (6 to 12) ____ Adults (18 to 64)
   ____ Preschoolers (3 to 5) ____ Students (13 to 17) ____ Seniors (65 and older)

9. Are you COMFORTABLE working with the HANDICAPPED?
   _____ Yes _____ No

10. Do you work BEST with:
    _____ Close Supervision? _____ Some Supervision? _____ Much Independence?

11. Are you BETTER at: (Please check ONE in each section)
    a. _____ Following directions, or
       _____ Being creative?
    b. _____ Quiet work, or
       _____ Active work?
    c. _____ Being on a rigid time schedule with set hours, or
       _____ Having flexible hours?
12. What kinds of INTERESTS and SKILLS do you have?

___ Organizing activities
___ Taking responsibility
___ Debating and/or persuading
___ Making decisions
___ Speaking to groups
___ Leading discussions
___ Meeting new people
___ Contacting people
___ Selling things
___ Accounting, budgeting
___ Research and analysis
___ Legal issues
___ Teaching (e.g., arts & crafts)
___ Quiet (thinking) games
___ Foreign languages: (Please list)
___ Repairing
___ Experimenting with mechanical devices
___ Carpentry
___ Driving a car/van/bus
___ Gardening
___ Landscaping
___ Recycling
___ Animal study or care
___ Camping and hiking
___ Swimming
___ Drawing and sketching
___ Cooking
___ Entertaining (e.g., singing)
___ Athletics and sports
___ Typing and filing

___ Other:

________________________

________________________

________________________

________________________

________________________

________________________

________________________

13. Is there anything else that you would like us to know?

________________________

________________________

________________________

________________________

________________________

________________________

________________________

Unit 6 - Recruitment and Public Relations

Handout #4 continued

Source: "How to Develop a Volunteer Career Portfolio," Statewide Volunteer Services, Office of the Governor, Hawaii.
Ten Recommendations for Volunteers

When you volunteer:

1. CHOOSE your volunteer work very carefully

2. FOCUS your volunteer work on a goal, and consciously try to develop SOME marketable skills and knowledge

3. ACCEPT increased responsibilities, taking career steps as a salaried employee would

4. KEEP accurate time records

5. REQUEST orientation to the agency and training for the job. Students should consider applying for ACADEMIC CREDIT if possible

6. REQUEST periodic job performance evaluations

7. KEEP your own volunteer career portfolio, including letters of recommendation and/or letters of commendation

8. PREPARE a resume detailing your own volunteer experiences, including your job description, achievements, and skills acquired on-the-job and through in-service training

9. WRITE a cover letter when you apply for a volunteer position, explaining how your skills and interests relate to the qualifications for the job

10. BE PREPARED to assertively show how your experience and skills are applicable to the type of volunteer job you want

Source: "How to Develop a Volunteer Career Portfolio," Statewide Volunteer Services, Office of the Governor, Hawaii.
A Public Relations Primer

Preface

This primer is designed to give you an idea of what public relations is all about. It contains excerpts from a public relations workshop conducted by James M. Smith, Executive Director of Hawaii Pacific Public Relations. It also contains notes from other sources, compiled by Baron Gushiken, Information Specialist, Statewide Volunteer Services, State of Hawaii.

Introduction

One of the greatest obstacles to implementing an effective public relations program is coming to grips with what public relations really means.

If you want a pragmatic public relations program, you have to start with a pragmatic definition. Every group has a public relations program, whether the group recognizes it as such or not.

It is the total communication effort you are now making.

Your group already has an image. It comes from everything you are doing or not doing. Therefore, the most practical approach you can take to public relations is to face the fact that you are in the business of public relations every day with every contact you make.

The challenge is to build on what you have.

Public relations is simply a matter of doing good and telling about it.

Most groups have excellent programs. But the main reason they don’t have excellent public relations is that no one is telling their story. Or they don’t tell the right people at the right time in any type of planned, systematic format.
Ten Elements of an Effective Public Relations Program

1. Good public relations starts with a strong identity.

Public relations is image-making. Every day you’re making thousands of first impressions by just writing letters, sending out printed materials, and talking to others.

A logo — a strong, graphic symbol for the group — is just as important as an appropriate name. People remember symbols better than they remember words and they recognize them more quickly.

2. Identify your publics.

As you begin to carefully identify the specific segments of the population publics that are most important to you, you begin to see that messages can be targeted to selected groups, with greater frequency and at less cost. You can begin to set priorities, developing an overall creative strategy with different messages directly targeted to each segment.

3. Have a planned program with concrete goals.

To do a good job in public relations, you need a written plan. A written plan gives you control. It says what you will do and when you will do it. It can also say what you won’t do.

4. Remember that the most important public is your own staff, clients, volunteers, etc.

Keep them happy and informed. If they don’t believe in the group, no one else will!

The most powerful form of advertising is word-of-mouth. It is also the most powerful form of public relations. Important impressions of a group are formed by the direct, face-to-face, day-to-day contact the members of your agency have with the public. Every member of your group must become an effective public relations person.

5. A good public relations program always starts with an accurate analysis of how the public views a situation (e.g., recruitment, awards, appeal of goods), not the how staff views it.

6. Public relations is everybody’s job.
Public relations should be practiced throughout the agency: from the receptionist who creates the first impression based on how quickly the phone is answered and how it is answered, to the agency manager/director who establishes fairness and confidence not only among visiting V.I.P.'s, but in day-to-day relations with staff.

7. If you don't have some money for public relations, you don't believe in it.

Information about your agency does not have to be in the form of a slick, glossy booklet, but can take the form of a neat and thoughtfully prepared flyer or brochure.

It has always been interesting to observe that groups don't have money for public relations until they get into trouble. Then, suddenly the money starts to flow. They often spend 100 times as much money restoring a tarnished image as they would have had to spend to keep a good image polished.

8. Do unto others as you would have them do unto you.

9. Count your blessings frequently, orally and in print.

Remember that public relations is doing good and telling about it. So get the goods news out.

10. "Humanize" your group.

Avoid an institutional image. People care about other people. In your public relations activities, therefore, try to humanize the organization.

Source: "How to Develop a Volunteer Career Portfolio," Statewide Volunteer Services, Office of the Governor, Hawaii
Creative Ways to Recruit Volunteers

- Pool ideas of salaried staff and volunteer staff on recruitment possibilities.
- Use all communication outlets: radio, television, newspapers, personal contacts, billboards, cable TV, etc.
- Offer stimulating, in-depth orientation to all interested people.
- Mail preference questionnaires to past clients and community newcomers.
- Have community coffees. Tell stories.
- Develop creative and attractive materials.
- Have current volunteers bring a friend.
- Be enthusiastic at all times.
- Contact clubs and service groups.
- Contact unions, minority groups, senior citizen groups, church groups, schools and universities.
- Develop handouts and brochures to leave in public places.
- Recruit in private businesses and corporations.
- Document successes.
- Recruit at job fairs, recognition and award activities.

Source: IVE Study, University of Wisconsin-Madison
Why Some People Don’t Volunteer

- Lack of time
- Personality traits or level of confidence
- No apparent match of interests, talents, or potential for enjoyment
- Not aware of volunteer options and possibilities
- Don’t have adequate transportation
- Concern about expenses
- Don’t have child care
- Have had previous bad experiences in volunteering

Source: IVE Study, University of Wisconsin--Madison
Volunteer Life Cycle

In recruiting efforts it may be useful to understand the life cycle concept presented by Paula J. Beugen in the Fall 1985 issue of "Voluntary Action Leadership." She outlines eight steps in the volunteer life cycle:

Step 1  Exploring the organization and its mission and activities. Volunteers get to know all about the organization and how they might fit in and contribute. Good communication is required at this step, or they may never move on to the next step.

Step 2  Committing to the volunteer activity even though they may be somewhat anxious about how they will do as a volunteer.

Step 3  Trying it out. They are involved and are starting to get their feet wet. They need reassurance, training, orientation, communication, feedback, acceptance, and recognition.

Step 4  Analyzing their experience, progress, accomplishments, potential for improvement, integration into the organization and volunteer groups, contributions, and evidence of the organization appreciation.

Step 5  Following the analysis, there comes a time of improving as a volunteer. Paula Beugen suggests that this stage is preceded by a time of renewed commitment. If volunteering has been a positive and successful experience, volunteers are then motivated to plan how they can improve, be promoted, gain new skills, or become more active and involved.

Step 6  Blooming through renewed confidence and successful experiences. Volunteers begin to be more assertive with ideas and observations, and they see how they can contribute to the improvement of program delivery, gain insights and share views with others.
Step 7. Sharing with others and exchanging ideas. They may nurture other volunteers, supporting others in gaining confidence. Beugen says that she would characterize this and the next step as the mature stage of the volunteer's life cycle.

Step 8. Leading takes sharing even further. It might involve long-term mentoring activities, or serving as a consultant to the group. It could lead to being a board member or chair of the support group. These volunteers become the people we go to for advice and support. They are "involved in attacking new challenges faced by the group. They are truly leaders of the organization."

Having these concepts in mind at the time of recruitment may give a vision to the volunteers that they definitely do have a place in your organization.
Who Volunteers? Research Your Market!

- 52 percent of American adults and 53 percent of American teenagers

- Upper socioeconomic groups are more likely to volunteer: 63 percent of people with annual household incomes of $20,000 or more and 63 percent of people with some college education volunteer

- Employed people are more likely to volunteer than people who are not working

- Generally, the following people are slightly more inclined to volunteer:
  - Women
  - People under the age of 55
  - People with children still at home
  - Suburban and rural residents
  - People living in larger households

- Volunteer areas:
  - Religion .................... 19 percent
  - Education ................... 12 percent
  - Health ....................... 12 percent
  - Recreation ................... 7 percent
  - Informal volunteer activities .... 23 percent

- 91 percent of all volunteers made financial contributions

- 31 percent of those who volunteered spent a minimum of 2 hours per week; 10 percent spent 7 hours or more

How Did They Become Involved?

- Someone asked them personally ......................... 44 percent

- A friend or family member was already involved ........ 29 percent

- Through participation in the group or organization ....... 25 percent

- Sought out the activity on their own .................... 25 percent

- Had seen some information about volunteer activity in the media ......................... 6 percent

Unit 6 - Recruitment and Public Relations

Handout #10

Source: AMERICANS VOLUNTEER, 1990, A Gallup survey commissioned by The Independent Sector, 1828 L Street NW, Washington, D.C. 20036
Interviewing

Objectives
Participants will:

- Understand the reasons for conducting an interview.
- Identify the skills necessary for a good interview.
- Practice interviewing and get feedback on style.
Worksheets

#1 Volunteer Application
#2 Interviewer’s Checklist
#3 Interview Skills
   Evaluation Sheet

Handouts

#1 Interviewing Tips
#2 Interview Questions
#3 Interview Role Play:
   Interviewer
#4 Interview Role Play:
   Volunteer
#5 Four Types of
   Interviews
#6 Common Errors In
   Interviewing

Overheads

#1 Why Should I
   Interview?
#2 Do I Qualify as an
   Interviewer?
**Lesson Plan**

<table>
<thead>
<tr>
<th>Materials</th>
<th>Suggested Presentation Technique</th>
<th>Time (min.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why Should I Interview?</td>
<td>MINI-LECTURE: Use overhead projector to display disclosure, or transfer information to flip chart. (overhead #1)</td>
<td>10</td>
</tr>
<tr>
<td>Do I Qualify as an Interviewer?</td>
<td>MINI-LECTURE: Same as above. (overhead #2)</td>
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</tr>
<tr>
<td>*Volunteer Application</td>
<td>GROUP ACTIVITY: On sample application, or on your own sample, participants identify areas where more/less information is needed. (worksheet #1)</td>
<td>15</td>
</tr>
<tr>
<td>*Interviewing Tips</td>
<td>MINI-LECTURE/DISCUSSION: Review handouts in dialogue with group. (worksheet #2, handouts #1 to #4)</td>
<td>20</td>
</tr>
<tr>
<td>*Interviewer’s Checklist</td>
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<tr>
<td>*Interview Questions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>*Four Types of Interviews</td>
<td>MINI-LECTURE/DISCUSSION: Same as above. (handouts #5 and #6)</td>
<td>20</td>
</tr>
<tr>
<td>*Common Errors in Interviewing</td>
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<td></td>
</tr>
<tr>
<td>*Interview Role Play</td>
<td>GROUP ACTIVITY: Divide participants into teams of two or three (interviewer/interviewee; observer optional). Distribute handouts. Participants role play an interview taking turns being the interviewer. Allow time for feedback in small groups. (handouts #3 and #4, worksheet #4)</td>
<td>30</td>
</tr>
<tr>
<td>*Interview Skills Evaluation Sheet</td>
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<tr>
<td>*Self-Assessment Form</td>
<td>Note: Handout #3 from Unit 6 (Recruitment and Public Relations) may be useful in the interview stage. May or may not use it with this section.</td>
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</tbody>
</table>

*Make a copy for each participant.
Interviewing -- (Introductory Remarks)

When a potential volunteer shows an interest in your program, you should set aside a special time to talk with him or her. The interview is an opportunity for you to choose each other. You are assessing the applicant’s skills, abilities, and suitability for the job, while the applicant is gathering information about your program and your need for help. Enough time should be set aside for meeting the needs of both of you. While referral and placement often happen as a result of the first interview, many times a second interview is required -- especially if the first interviewer will not be supervising the volunteer. Enough information for the initial referral should be gathered during the interview.

Work at eliminating surprises! A good interview will outline expectations on the part of both the organization and the volunteer. A work-related surprise can cause stress and pressure and reduce the satisfaction of all involved.
Why Should I Interview?

- To determine the needs of the program and the volunteer
- To investigate the interests and expertise of the potential volunteer
- To determine areas of concern, e.g., child care needs, transportation
- To ask about the volunteer's time commitment
- To consider the training needs of the salaried staff and volunteer staff
- To determine what support, guidance, and will be needed by the volunteer
- To clarify the job to be done
- To determine the compatibility of the volunteer with the program and the current salaried and volunteer staff
Do I Qualify As An Interviewer?

- I have good listening skills
- I have skill at framing questions
- I have enthusiasm
- I have knowledge of the program
- I have good observation skills
- I have the ability to record and evaluate observations
- I have knowledge of outside resources for referral
- I have good public relations abilities
- I have the ability to look at both process and content
- I have a sense of responsibility and concern for the volunteer
Volunteer Application

NAME_________________________ DATE OF APPLICATION _______________

ADDRESS____________________________________ number street city state zip

PHONE_______________________ __________________ Can we call you at work?__________

home work

In case of emergency, please notify:

___________________________ name ____________________________ phone/relationship

1. Education and work experience. Please list current and past work experience.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

2. Volunteer experience. Please list the organizations for whom you have volunteered and the kinds of work you did for them.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

3. Special skills, interests, or hobbies. Please list those skills, interests, or hobbies you are willing to share with others and your proficiency level in each. For example, Spanish--fluent; computer programmer--novice.

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

(over)

Unit 7 - Interviewing

Worksheet #1
4. Why do you wish to volunteer?

__________________________________________________________________________

__________________________________________________________________________

5. How did you learn about our program?

__________________________________________________________________________

6. Are you planning to use this volunteer experience to fulfill requirements for a class or to gain new or additional skills toward a career?

Yes________ No________ How can we help?______________________________

7. What days and times are best for you? Please list in one-hour blocks.

(Sunday    Monday    Tuesday    Wednesday    Thursday    Friday    Saturday)

Best time to call:_____________ a.m./p.m.

Are there any days or times that are especially bad for you?________________

8. How long do you anticipate that your available times will remain the same?

9. Do you have your own transportation?

_____ yes   _____ no   _____ bus   other:____________________________________

10. Would you be willing to assist with transportation needs from time to time?

_____ yes   _____ no
Interviewing Tips

1. Prepare for the interview. Review the application and know what you’re looking for.

2. Be aware of the interviewee’s anxiety. Every interview, whether for a salaried or volunteer position, results in some anxiety on the part of the interviewee. Therefore, an important goal of the interviewer is to make the volunteer feel comfortable. Be gracious -- don’t keep people waiting.

3. Be sure the potential volunteer leaves with his or her self-esteem intact. If, during the interview, it becomes obvious you cannot place the volunteer within your program, explore other options. Provide the volunteer with a referral to another program. Take time to make the interviewees feel good about themselves and their ability to become involved.

4. Make introductions. Introduce yourself and anyone else who may be in the area. Make sure you learn what name the interviewee would like to go by -- often a Michael would prefer Mike -- but do not assume this to be true.

5. Do not allow interruptions -- they are discourteous, derail the thought process, and increase the anxiety level of the interviewee. If you must accept telephone calls, for example, let the interviewee know in advance that this is necessary and apologize for the inconvenience.

6. Talk briefly about the volunteer’s application, noting items of interest. This establishes a positive mood and lets the volunteer know that you took the time to read the application.

7. Set a structure for the interview. Verbalize what you are doing, learn what the volunteer expects, how he or she learned about the program, etc.

8. If you plan to take notes, ask permission and try not to be too obtrusive in your note taking. Do not take notes during revelations that may be painful for the interviewee.

9. Ask open-ended questions and try to use a conversational style rather than an interrogative one. See the difference between the two sequences below:

<table>
<thead>
<tr>
<th>Conversational</th>
<th>Interrogative</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question<em>Response</em>Comments/Discussion</td>
<td>Question*Response</td>
</tr>
<tr>
<td>Question<em>Response</em>Comments/Discussion</td>
<td>Question*Response</td>
</tr>
</tbody>
</table>

Unit 7 - Interviewing            Handout #1
10. Avoid invading the individual's privacy. Keep the interview on track.

11. Be an animated learner -- paraphrase and check perceptions often.

12. Be aware of your own nonverbal communication -- be friendly and alert.

13. Be aware of how the interviewee is making you feel. Why do you feel this way?

14. Avoid leading questions but use the echoing technique to get clarification: "That job was sort of Mickey Mouse so I left." "Mickey Mouse?"

15. Silences are anxiety-producing in an interview situation. Try not to let them go on too long.

16. Summarize at the end -- let the volunteer know what to expect after the interview and what options are available. Negotiate the job particulars if that is appropriate.

17. If a match is made, set up the day and time for the volunteer to report for orientation.

18. If you are unsure about the volunteer, ask for and check references to help you make an informed decision.

19. You should avoid certain questions which pertain to protected categories. Although you can ask any question, problems occur when protected information is used to make a hiring decision. Protected categories as defined by the U.S. Department of Labor, include: Race, color, sex, national origin, religion, mental handicap, physical handicap, Vietnam veteran and disabled veteran status. Other characteristics may be covered by state law. Contact the Employment Division in your state for information.
Interviewer's Checklist

Appointment date and time: ______________________ a.m./p.m.

Name: __________________________________________

Address: ________________________________________
          (street, city, and zip) (phone)

Occupation: ______________________________________ (business phone)

Position of interest to the applicant:

________________________________________________________________________

History of prospective volunteer's previous work and volunteer experience, interests, hobbies, etc.:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Information you wish to give the applicant

•
•
•
•

Questions you wish to ask the applicant

•
•
•
•
Who should be consulted/sit in on the session/meet the applicant? 

__________________________________________

__________________________________________

What else do you need for the interview? 

__________________________________________

__________________________________________

Agreements made with the applicant 

__________________________________________

__________________________________________
Interview Questions

The interview should build on the information obtained from the application form. Questions you may want to ask include:

1. What did you like best/least about the jobs you have held?

2. How did you find out about us and what we do? What would you like to know about our agency?

3. Why do you want to volunteer here? What do you like about our service?

4. What are your own special abilities, strengths, assets, weaknesses, liabilities?

5. In what positions are you most interested? What do you look for in a job?

6. What are your vocational plans? How can we help you achieve them?

7. Why do you want to volunteer? Who recommended you to us? Us to you?

8. What size group suits you best? With what age group are you most comfortable?

9. How do you handle stress?

10. What style of supervision are you comfortable with? What kind of supervisor do you like?

11. Give me an example of a project completed as a result of your cooperation with others. Do you like active or quiet work? Do you like routine work?

12. What experience do you have with: Grant writing, public speaking, arts and crafts, etc.?

13. Why do you feel you will enjoy working with individuals?

14. Do you have automobile insurance? Personal Accident Insurance? Are you willing to drive your car to transport clients? Can you work odd hours?

15. What expenses can you incur as a result of your volunteering here?
## Interview Skills Evaluation Sheet

### How Well Did I Establish Rapport?

<table>
<thead>
<tr>
<th>Did I:</th>
<th>Yes</th>
<th>No</th>
<th>Not Sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Greet the applicant cordially?</td>
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<tr>
<td>- Show by my attitude that I had set aside enough time for the interview?</td>
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<tr>
<td>- Give the applicant my name?</td>
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<tr>
<td>- Call the applicant by name?</td>
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<tr>
<td>- Act relaxed?</td>
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<tr>
<td>- Open the interview with a topic of common interest?</td>
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<td>- Act accepting of any physical handicap?</td>
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<tr>
<td>- Avoid personal comments?</td>
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<tr>
<td>- Show friendliness and politeness?</td>
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<td></td>
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<tr>
<td>- Show confidence in my ability to explain the options available?</td>
<td></td>
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</tbody>
</table>

### How Well Did I Evaluate The Interview?

<table>
<thead>
<tr>
<th>Did I:</th>
<th>Yes</th>
<th>No</th>
<th>Not Sure</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Review the notes I had taken and make additional notes while the conversation was fresh in my mind?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Summarize pros and cons?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Over emphasize any one factor in reaching a decision?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Record any pertinent or unusual facts that have a bearing on the situation?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Secure additional information, if needed, from other sources?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Make recommendations?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Make certain that any prejudices that I may have did not influence my decision?</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

--Adapted from "I Can" materials, American Red Cross. Permission granted.
Interview Role Play

Interviewer

Process

1. Participants assume the roles of interviewer and interviewee. The roles should be rotated so that everyone has an opportunity to be the interviewer. Optional: An observer can be added as a neutral member of each team.

2. Use this handout and handout #4 to provide the background for the interview. Optional: The observer adapts the interview skills evaluation sheet (worksheet #3) to record impressions and uses the three Interviewing handouts as background.

3. After each practice interview, the interviewer fills out a brief self-evaluation (worksheet #3). Then all participants compare their observations.

Interviewer Role Description

You are the volunteer coordinator of a community health/crisis referral center. All five volunteer groups (see below) are available for the placement of this new person. There are several vacancies in each of the volunteer groups now, and you could use volunteer assistance as backup for on-site staff as well.

This is the way your organization is staffed:

Volunteers: switchboard
            crisis intervention
            nutrition counseling classes
            volunteer drivers (on call)
            trainers for volunteers

Staff (on-site): volunteer coordination
                counselors

Staff (referral): physicians
                dentists
                nutritionist
                psychologist
Interview Role Play
Volunteer

Process

1. Participants assume the roles of interviewer and interviewee. The roles should be rotated so that everyone has an opportunity to be the interviewer. Optional: An observer can be added as a neutral member of each team.

2. Use this handout and handout #3 to provide the background for the interview.

3. After each practice interview, the interviewer fills out a brief self-evaluation (worksheet #3). Then all participants compare their observations.

Volunteer Role Description

You have just moved to the area 3 months ago. Your children are kindergarten or elementary school age.

Before moving, you had taught Sunday school, produced a poster for a world hunger fund-raising event, and been involved with the PTA. You are interested in helping others.

You are soft-spoken, calm, a bit shy, and do not readily talk about yourself. But you are a sincere person with a generous spirit and a warm smile.

You know little about the agency and don’t know what role volunteers have in it. You may or may not be sure what kind of work you want to do.

Discussion

- Were the purpose and structure of the organization fully explained?
- How were volunteers and jobs matched?
- How was the volunteer’s choice determined and considered?
Four Types Of Interviews

The screening interview:

- Initial interview
- Usually conducted by the person responsible for recruiting volunteers
- Purpose is to determine if the applicant meets basic requirements
- Goal is to allow for referral for further consideration
- Usually lasts 15 to 30

In-depth interview:

- Intense and lengthy; usually conducted by the person to whom the volunteer reports
- Purpose is to determine compatibility between the volunteer and organization, to see whether volunteer has appropriate skills or could be trained to acquire skills, and to determine whether volunteer can work with program clients
- Lasts 45 minutes to an hour

Follow-up or evaluation interview:

- Periodic interview to evaluate progress
- Identifies problems
- Assesses promotional opportunities
- Celebrates successes

Exit interview:

- Brings closure on the volunteer experience
- Gives feedback for use in making program improvements
- Allows for a time to say thank you
Common Errors In Interviewing

1. Asking leading questions
2. Making a decision too early in the interview
3. "Stereotyping, without recognizing individual differences"
4. Lacking knowledge of precise job requirements
5. Letting pressures of duties shorten interview time
6. Doing more talking than listening
7. Failing to direct the interview
8. Not knowing what to look for
9. Tending to be overly influenced by individual factors rather than considering the person as a whole
10. Lacking skills in asking questions and probing
11. Failing to describe the organization and the job in sufficient detail
12. Tending to use standard interview, instead of adapting each interview to the individual
13. Being interviewed by the candidate instead of being the interviewer
14. Not following up on placements to see if performance bears out the judgment of the interviewer
15. The most frequent and difficult to overcome mistake: Judging the applicant solely on personality, overlooking other important factors

Unit 7 - Interviewing

Handout #6

Source: "How to Develop a Volunteer Career Portfolio," Statewide Volunteer Services, Office of the Governor, Hawaii.
Motivating Volunteer Staff

Objectives
Participants will:

- Analyze their motivational behavior.
- Understand volunteer behavior patterns and the selection of appropriate assignments.
### Lesson Plan

<table>
<thead>
<tr>
<th>Materials</th>
<th>Suggested Presentation Technique</th>
<th>Time (min.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Why I Am Not A Volunteer</td>
<td>LECTURE/DISCUSSION: Read the article and relate its comical and irritating examples to human nature and motivation. Focus the discussion on prevention of problems and frustration. (handout #1)</td>
<td>10</td>
</tr>
<tr>
<td>* Motivational Analysis</td>
<td>ACTIVITY/DISCUSSION: Distribute copies and allow about 5 minutes for participants to complete the sheet. Then distribute the key. A group discussion of responses and comments about insights should follow. (worksheets #1 and #2)</td>
<td>20</td>
</tr>
<tr>
<td>* Motivational Analysis Key</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Motivations for Volunteering</td>
<td>MINI-LECTURE/DISCUSSION: Highlight key points and solicit contributions to each section of the handout. Distribute copies after discussion. Use overhead #1 as appropriate. (handout #2)</td>
<td>20</td>
</tr>
</tbody>
</table>

* Make a copy for each participant.
Motivating Volunteer Staff -- Introductory Remarks

What motivates people to enter volunteer service and work without pay? Most likely their motives are a mixture of unselfish regard for the welfare of others, personal interests, and a striving for self-fulfillment. Recruiters need to understand the motives of each volunteer and respect them. To be successful, recruitment techniques must be based on the reasons people volunteer and must emphasize the benefits to the volunteer rather than to the program.

Volunteers bring the uniqueness of their own life experiences, personalities, and special talents to an organization. Their reasons for volunteering reflect their needs at any given time. As volunteers gain experience, those reasons may change until they bear little resemblance to those that made them volunteer initially. Therefore, to keep volunteers as active workers, the program should accommodate their changing needs and provide opportunities for personal growth and advancement.
Why I Am Not A Volunteer
(a not-so-tongue-in-cheek confession of a former volunteer)

SOMEHOW, I get the feeling that NOT to be a volunteer in someone's program today is to be uncivilized. But, like many of my fellow sitter-outers, I have reasons for letting opportunity pass me by. You, the program operator, the professional, have supplied me with them. Do you really want to know why I am not a volunteer?

1. For a long time I never knew you wanted me. You communicated quite well, "I'd rather do it myself, thank you." You are articulate in expressing your needs in dollars and decimals. Your silence about services, I figured, was your last word.

2. You did call for help once, and I stepped forward. But you never told me how to get started. I later felt like someone who'd been told, "Let's have lunch . . . sometime and never got a call."

3. I persevered, however; I reported for duty. You turned me over to a department head and she, in turn, sent me down to the section chief. He was out and the secretary did not know what to do with so rare a species as a volunteer, so he suggested that I get in touch next Tuesday. I called but my message got lost.

4. I might have overlooked the runaround because people cannot be blamed for doing the best they can. For some reason, I thought that you, as their leader, would have given a bit of thought beforehand to what you would do with me, a volunteer. I thought you'd at least have let someone else know I was coming and given them the worry of organizing the situation.

5. Come time for the spring mail-out and my neighbor and I appeared on the scene. We worked for two days licking stamps and envelope flaps until the steak at supper tasted like tongue. Then I learned from the slip of a clerk that before our arrival you had turned off the postage machine. I really cannot blame you; if you had not gone out of your way to make work for us, what would a couple of volunteers have done for two whole days?

6. I tried again a number of times. But you really did not expect much of me. You never trained me or insisted on high standards for work. A particularly tough day was coming up for the crew and I cut out--it was a perfect day for golf. On my return, you said nothing about my absence, except to ask about my score. I never learned if my truancy made any difference.
7. In spite of all of the above I think I did make a contribution. But the only real thanks I got was a letter from you -- a form letter. I know how much work this letter was for you. My neighbor had typed the master copy, I had copied it, and together we had forged your name, stuffed the envelopes, sealed, stamped, and mailed them.

Discussion:

- How typical are these examples?
- What could have prevented these frustrations?
- In each instance, how could the problem have been avoided?
Motivational Analysis

Each of the following questions has three choices. Select the one which most closely describes your own motivations. Remember, there are no wrong answers.

1. ___a. When doing a job I seek feedback.
   ___b. I prefer to work alone and am eager to be my own boss.
   ___c. I seem to be uncomfortable when forced to work alone.

2. ___a. I go out of my way to make friends with new people.
   ___b. I enjoy a good argument.
   ___c. After starting a task I am not comfortable until it is completed.

3. ___a. Status symbols are important to me.
   ___b. I am always getting involved in group projects.
   ___c. I work better when there is a deadline.

4. ___a. I work best when there is some challenge involved.
   ___b. I would rather give orders than take them.
   ___c. I am sensitive to others -- especially when they are angry.

5. ___a. I am eager to be my own boss.
   ___b. I accept responsibility eagerly.
   ___c. I try to get personally involved with my superiors.

6. ___a. I am uncomfortable when forced to work alone.
   ___b. I prefer being my own boss even when others feel a joint effort is required.
   ___c. When given responsibility I set measurable standards of high performance.

7. ___a. I am very concerned about my reputation or position.
   ___b. I have a desire to out perform others.
   ___c. I am concerned with being liked and accepted.
8.  ___a. I enjoy and seek warm, friendly relationships.
    ___b. I attempt to have complete involvement in a project.
    ___c. I want my ideas to predominate.

    ___b. It concerns me when I am being separated from others.
    ___c. I have a need and desire to influence others.

10. ___a. I think about consoling and helping others.
     ___b. I am verbally fluent.
     ___c. I am restless and innovative.

11. ___a. I set goals and think about how to attain them.
     ___b. I think about ways to change people.
     ___c. I think a lot about my feelings and the feelings of others.

Unit 8 - Motivating Volunteer Staff  Worksheet #1 continued
## Key: Motivational Analysis

Using this key, circle your choices and add up the totals for each motivational choice.

<table>
<thead>
<tr>
<th></th>
<th>a. Achievement</th>
<th>b. Influence</th>
<th>c. Affiliation</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
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<td>9.</td>
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<td>10.</td>
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<tr>
<td>11.</td>
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</tbody>
</table>

Total

Achievement
Influence
Affiliation

Unit 8 - Motivating Volunteer Staff  
Worksheet #2
Motivations For Volunteering

This background information is excerpted from Motivational and Organizational Climate. It relates to the concepts on the Motivational Analysis worksheets (worksheets #1 and #2) but does not match them precisely. It therefore should not be directly correlated with the activities outlined in those worksheets.

1. **ACHIEVEMENT MOTIVE**

   Goal: Success in situations requiring excellent performance

   Characteristics:
   
   a. Concerned about excellence
   b. Wants complete involvement
   c. Desires to outperform others (competitive), thorough
   d. Wants unique accomplishment
   e. Restless and innovative (enjoys striving)

   Thinks about:
   
   a. Doing job better
   b. Goals and how to attain them
   c. Obstacles and how to remove them (innovation)

   For those who seem to be achievement-motivated, try to select tasks which:
   
   a. Allow latitude in setting work pace and work methods
   b. Allow for help and feedback and direction from others when necessary
   c. Require errorless and efficient performance for the success of the agency
   d. Challenge abilities and skills
   e. Allow for clear, unambiguous feedback about performance
   f. Provide an opportunity to learn new material or skills

2. **POWER MOTIVE**

   Goal: Having impact or influence

   Characteristics:
   
   a. Concern for authority, power
   b. Wants own ideas to predominate
c. Has strong feelings about influence in decision-making
d. Has strong need to influence others
e. Often verbally fluent

Thinks about:

a. Influence and control over others and how to use them to win arguments, change people, and gain status and authority
b. Improvements in communication

For those who seem to be power-motivated, try to select tasks which:

a. Allow opportunity to direct co-workers and to make changes
b. Allow time for personal interaction while working
c. Provide an opportunity to deal directly with superiors
d. Allow personal control over work pace and work methods
e. Require managerial skills

3. AFFILIATION MOTIVE

Goal: Being with someone and enjoying mutual friendship

Characteristics:

a. Concerned with being liked and respected
b. Wants warm, friendly relationship
c. Concerned about being separated from others

Thinks about:

a. Wanting to be liked
b. Consoling and helping people
c. Feelings of others and self

For those who seem to be affiliation-motivated, try to select tasks which:

a. Allow many people to interact
b. Require cooperation of co-workers for successful task completion
c. Allow time for personal non-task interaction while working
d. Allow for the maintenance of stable working relationships
4. **RECOGNITION MOTIVE**

Goal: Recognition for work performed

Characteristics:

- a. Concerned about status
- b. Prefers short-term task with clear beginning and end
- c. Identifies with popular projects
- d. Concerned about prestige

Thinks about:

- a. Public and PR aspects of activities
- b. Advancement in role
- c. Completing assigned work in a timely fashion

For those who seem to be recognition-motivated, try to select tasks which:

- a. Can be completed in a short period of time
- b. Are visible to others in the group or to the community at large
- c. Are newsworthy
- d. Have tangible rewards (plaque, citation, announcement)

5. **ALTRUISM MOTIVE**

Goal: Pursuit of the general good or public interest

Characteristics:

- a. Concerned with idealism, morality, justice
- b. Values universality
- c. Frequently judgmental

Thinks about:

- a. Standards of the group and the community
- b. Evaluation without regard for personal ramifications
- c. Accountability
For those who seem to be altruism-motivated, try to selected tasks which:

a. Involve meshing agency program with accepted commitment and goals
b. Include other groups with identifiable and acceptable values
c. Affect generally accepted community concerns

Recognition and altruism may not be singular motivators but are often paired with achievement, power or affiliation as another dimension of motivation.

### Motivations For Volunteering

<table>
<thead>
<tr>
<th>Motivation</th>
<th>Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ACHIEVEMENT</strong></td>
<td>Success in situations requiring excellent performance</td>
</tr>
<tr>
<td><strong>POWER</strong></td>
<td>Having impact or influence</td>
</tr>
<tr>
<td><strong>AFFILIATION</strong></td>
<td>Being with someone and enjoying mutual friendship</td>
</tr>
<tr>
<td><strong>RECOGNITION</strong></td>
<td>Recognition for work performed</td>
</tr>
<tr>
<td><strong>ALTRUISM</strong></td>
<td>Pursuit of the general good or public interest</td>
</tr>
</tbody>
</table>

Orientation and Training

Objectives
Participants will:

• Understand the difference between orientation and training and learn to identify the important components of a good orientation plan.
• Understand the purpose of conducting training programs and practice developing a training plan to address issues of personal and career development of volunteers.
<table>
<thead>
<tr>
<th>Worksheets</th>
<th>Handouts</th>
<th>Overheads</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1 Personal Training Plan</td>
<td>#1 What Should Be Included in an Orientation?</td>
<td>#1 Why Have an Orientation?</td>
</tr>
<tr>
<td></td>
<td>#3 Expectations</td>
<td></td>
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<td></td>
<td>#4 Implications for the Training of Volunteers</td>
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<tr>
<td></td>
<td>#5 Helpful Hints for Planning Training Sessions</td>
<td></td>
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</tbody>
</table>
### Lesson Plan

<table>
<thead>
<tr>
<th>Materials</th>
<th>Suggested Presentation Technique</th>
<th>Time (min.)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Why Have An Orientation?</strong></td>
<td>GROUP ACTIVITY: For both topics, brainstorm and list reasons on flip chart. Distribute copies of What Should Be Included. (overhead #1, handout #1)</td>
<td>20</td>
</tr>
<tr>
<td>* What Should Be Included in an Orientation?</td>
<td>MINI-LECTURE: Emphasize differences between initial and on-site orientation. (handout #2)</td>
<td>5</td>
</tr>
<tr>
<td><strong>Expectations</strong></td>
<td>Note: Also refer to Unit 4 (Rights and Responsibilities/Policies). (handout #3)</td>
<td>5</td>
</tr>
<tr>
<td><strong>Why Train Who Trains Training Techniques</strong></td>
<td>MINI-LECTURE: Use progressive disclosure on overhead projector or flip chart. (overhead #2)</td>
<td>10</td>
</tr>
<tr>
<td>* Implications for the Training of Volunteers</td>
<td>MINI-LECTURE/DISCUSSION: Introduce each numbered statement. Solicit interpretations from participants before discussing implications. (handout #4)</td>
<td>5</td>
</tr>
<tr>
<td>* Helpful Hints for Planning Training Sessions</td>
<td>MINI-LECTURE: Use progressive disclosure (flip chart/overhead) to discuss main points. (handout #5)</td>
<td>5</td>
</tr>
<tr>
<td>* Personal Training Plan</td>
<td>ACTIVITY: Announce the 10-minute time limit and ask participants to form clusters. Participants work in teams of 2 or 3 to outline a training plan for a specific volunteer. A list of characteristics or training needs will give the group a common set of standards. (worksheet #1)</td>
<td>10</td>
</tr>
</tbody>
</table>

* Make a copy for each participant.
The distinction between orientation and training is often quite fine. Orientation is simply the act of being oriented or directed. It can be on-site orientation or general procedures orientation. Training (conferences, consultations, field observations, etc.) generally begins with orientation sessions and continues indefinitely. The amount and type of training volunteers should receive depends upon their past experience, the particular needs of the volunteer, and the skills required to do the job. The training program can be simple as long as it provides the volunteer with the knowledge, skills, and attitudes necessary for effective performance. Many volunteer jobs require an on-the-job question/answer/demonstration-style training. This type of training is both legitimate and necessary. Never assume that training will be redundant. Outline the training plan to the volunteer and the trainer. Recognize that training will take some time and make allowances accordingly.
Why Have An Orientation?

Brainstorm a list of reasons for having an orientation.

1.

2.

3.

4.
What Should Be Included In An Orientation

1. Agency history

2. The purpose and objectives of the organization and its role in the community; the purpose, objectives, and role of the section for which the volunteer will be working

3. The administrative structure (organization chart) and an explanation of how the governing body relates to staff, to the public, to clients, and to volunteers

4. Fundraising policies, funding sources, and procedures

5. Personnel policies relating to procedures and regulations that pertain to volunteers (e.g., insurance, safety, parking, coffee breaks, etc.)

6. Rules and regulations pertaining to the volunteers and an interpretation of volunteers' duties, rights, and role in the organization

7. Salaried staff

8. Floor plan or other appropriate maps
What About An On-site Orientation?
What Should Be Included?

1. Staff introductions

2. Practical details such as where to leave coats and personal items, use of the lunchroom, rest room, coffee, telephone, parking, etc.

3. Background information about your program component. Current projects or activities, general organizational structure, seasonal schedules, etc.

4. Rules and philosophies (this is often critical when working with young children or disabled populations where consistency is so important)

5. Introduction to supervisor and review of job description. This portion of the orientation should provide an opportunity to formally set the volunteer's work schedule and to negotiate the various components of the job

6. Record-keeping (signing in and out, time log report, etc.)

7. Staff roles and responsibilities. Let the volunteer know who will be able to provide direction or assistance in the absence of the supervisor

8. Materials needed to do the job. Let the volunteer know where additional supplies can be found and where his/her office space will be

9. A plan for the volunteer's continued training. If all training will be on the job, the volunteer needs to know this and feel comfortable with the idea. Sometimes a supervisor assumes that a volunteer does not need or want training when, in fact, the volunteer would really appreciate a refresher in certain areas or training that would result in expansion of the volunteer assignment. It is important that the supervisor ask the volunteer initially what kinds of training might be required, and check back to learn of training needs that may be identified.

NOTE: Much of this orientation can be addressed in a handbook.
Expectations

<table>
<thead>
<tr>
<th>What Does Salaried Staff Expect of Volunteer Staff?</th>
<th>What Does Volunteer Staff Expect of Salaried Staff?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promptness</td>
<td>Consideration</td>
</tr>
<tr>
<td>Enthusiasm</td>
<td>Patience</td>
</tr>
<tr>
<td>Flexibility</td>
<td>Appreciation</td>
</tr>
<tr>
<td>Dependability</td>
<td>Respect</td>
</tr>
<tr>
<td>Patience</td>
<td>Courtesy</td>
</tr>
<tr>
<td>Loyalty</td>
<td>Pleasant voice</td>
</tr>
<tr>
<td>Businesslike attitude</td>
<td>Sincerity</td>
</tr>
<tr>
<td>Imagination and creativity</td>
<td>Cooperative attitude</td>
</tr>
<tr>
<td>Nondisruptive influence</td>
<td>Clear directions</td>
</tr>
<tr>
<td>Tact</td>
<td>Treatment of volunteers as professional assistants</td>
</tr>
<tr>
<td>Sense of humor</td>
<td>Friendliness, and welcoming attitude</td>
</tr>
<tr>
<td>Interest in helping for the benefit of community</td>
<td>Tasks ready for the volunteer</td>
</tr>
<tr>
<td>Discretion and trustworthiness with confidential matters</td>
<td>Demonstration of how to use machines, when applicable</td>
</tr>
<tr>
<td>Willingness to help, ask for directions, accept training, try a variety of approaches and techniques</td>
<td>Explanation of specific expectations</td>
</tr>
<tr>
<td>Pleasant demeanor, friendliness, warm, positive attitude</td>
<td>Explanation of policies and procedures</td>
</tr>
<tr>
<td>Appropriate dress</td>
<td>Willingness to help volunteer as needed</td>
</tr>
<tr>
<td>What Does Salaried Staff Expect of Volunteer Staff?</td>
<td>What Does Volunteer Staff Expect of Salaried Staff?</td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>--------------------------------------------------</td>
</tr>
<tr>
<td>Initiative</td>
<td>Assignment of tasks volunteers can handle</td>
</tr>
<tr>
<td></td>
<td>Information about schedule changes</td>
</tr>
<tr>
<td></td>
<td>Materials needed for assigned tasks</td>
</tr>
<tr>
<td></td>
<td>Constructive criticism or correction, but not in front of others</td>
</tr>
<tr>
<td></td>
<td>Acceptance of creative ideas and suggestions of volunteer</td>
</tr>
<tr>
<td></td>
<td>Relevant information that will help volunteer work</td>
</tr>
<tr>
<td>Other</td>
<td>Other</td>
</tr>
</tbody>
</table>
Why Train:

1. Show you care
2. Increase awareness
3. Develop skills
4. Maintain skills
5. Improve skills

Who Trains:

1. Supervisor
2. Department head
3. Volunteers or salaried staff
4. Team of salaried staff and volunteers
5. Outside expert

Training Techniques:

<table>
<thead>
<tr>
<th>STYLE</th>
<th>TYPE</th>
</tr>
</thead>
<tbody>
<tr>
<td>One-to-one</td>
<td>Classroom</td>
</tr>
<tr>
<td>Group</td>
<td>On-site</td>
</tr>
<tr>
<td>Combination</td>
<td>Observations</td>
</tr>
<tr>
<td></td>
<td>Written materials</td>
</tr>
<tr>
<td></td>
<td>Field trips</td>
</tr>
<tr>
<td></td>
<td>Lecture</td>
</tr>
<tr>
<td></td>
<td>Workshops/conferences</td>
</tr>
</tbody>
</table>

Unit 9 - Orientation and Training

Overhead #2
### Implications For The Training Of Volunteers

Listed below are some generalizations about volunteers that have important implications for volunteer training.

<table>
<thead>
<tr>
<th>Generalization</th>
<th>Implication</th>
</tr>
</thead>
<tbody>
<tr>
<td>Volunteers bring with them a wide variety of experience, knowledge, and skills.</td>
<td>Training methods that build on and use the volunteer's experience, knowledge, and skills will produce the best and most relevant kind of learning.</td>
</tr>
<tr>
<td>Volunteers, by and large, will come as self-directed, motivated, interested learners.</td>
<td>Volunteers are adults who can help plan and conduct their own learning experiences as active participants.</td>
</tr>
<tr>
<td>Volunteers participate in training events because they want to learn to do their volunteer jobs.</td>
<td>The training must be practical and relevant to the learners and must be related to life as they know it.</td>
</tr>
<tr>
<td>Many volunteers will have been exposed to classroom-like training situations that were not helpful, relevant, exciting or appropriate for adult learning.</td>
<td>The learning activities must take place in an informal, experiential atmosphere.</td>
</tr>
<tr>
<td>Volunteers have a number of important roles (as parents, workers, students, citizens) that compete for their time.</td>
<td>Training should be planned to take into account the limited amount of time available to most volunteers and to accept the legitimacy of their other loyalties.</td>
</tr>
<tr>
<td>The world of volunteerism has not developed norms or procedures to support and reward participation in ongoing training programs.</td>
<td>Training opportunities and activities must be integrated into organizational functioning and lead to tangible rewards in the work place.</td>
</tr>
<tr>
<td>Generalization</td>
<td>Implication</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Often the training format and content have been developed over the years and</td>
<td>Each training event, if possible, should be planned by trainers and some of</td>
</tr>
<tr>
<td>have not been revised or tailored to particular participants at a particular</td>
<td>the potential participants to meet the current needs of a particular group.</td>
</tr>
<tr>
<td>time.</td>
<td></td>
</tr>
<tr>
<td>Training is often a one-time thing instead of an ongoing support opportunity</td>
<td>Ongoing, in-service training is necessary for volunteers and beneficial for</td>
</tr>
<tr>
<td>for volunteers.</td>
<td>the organization. The importance of follow-up should be communicated at the</td>
</tr>
<tr>
<td></td>
<td>beginning of the learning experience.</td>
</tr>
<tr>
<td>Volunteer training is usually seen as an event sponsored by one organization,</td>
<td>Training plans should integrate groups within the organization to utilize all</td>
</tr>
<tr>
<td>or for volunteers in one category, such as new/experienced, board/office</td>
<td>possible resources. This will place it in the context of a group process and</td>
</tr>
<tr>
<td>workers, service/personnel, etc.</td>
<td>emphasize a team relationship.</td>
</tr>
</tbody>
</table>

Excerpted from The Volunteer Community, Center for a Voluntary Society, Rainman & Lippitt, 1971.
Helpful Hints For Planning Training Sessions

• Skill training can be designed for both salaried staff and volunteer staff.

• Develop categorized training packets that can be used over and over again. Packets can be developed for people working in similar areas, for example: Volunteers working with local offices, policy boards, women's groups, etc. Once the basic information is put together it can be reused effectively and efficiently.

• Review your training materials. Which things might fit better in orientation packets and which should be included in job descriptions?

• Find out what's offered by other groups in the community as well as other sections within your program. Explore cooperative cross-training.

• Be creative! Be flexible!

• Collect and review volunteers' ideas for more/other training. Their ability to identify needs and their willingness to attend such sessions may lead to new programs which will benefit others.
Personal Training Plan

Name ___________________________ Position ___________________________

Date ___________________________ Review date ___________________________

Career goal/direction ___________________________________________________

Goal for this quarter ___________________________________________________

Supervisor responsible for assisting with training ___________________________

PLAN

1. ____________________________________________________________
   ____________________________________________________________

2. ____________________________________________________________
   ____________________________________________________________

3. ____________________________________________________________
   ____________________________________________________________

4. ____________________________________________________________
   ____________________________________________________________

REVIEW

________________________________________________________________

________________________________________________________________

________________________________________________________________

________________________________________________________________

Supervisor's comments _____________________________________________

Volunteer's comments _____________________________________________

Unit 9 - Orientation and Training Worksheet #1
Supervision

Objectives
Participants will:

• Identify characteristics of a good supervisor and rate themselves as supervisors.
**Worksheets**

#1 Rate Yourself as a Volunteer Supervisor

**Handouts**

#1 Hints Concerning Supervision of Volunteer Programs

**Overheads**

#1 Leadership
#2 Are You on Target?
#3 Are You Slipping?
#4 Working with Volunteers
#5 Supporting Volunteers
#6 Effective Supervisors
#7 Ineffective Supervisors
#8 Difficulties in Working with Volunteers
#9 Challenges in Working with Volunteers
#10 Clientele's Evaluation of Volunteers

### Lesson Plan

<table>
<thead>
<tr>
<th>Materials</th>
<th>Suggested Presentation Technique</th>
<th>Time (min.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Rate Yourself as a Volunteer Supervisor</td>
<td>ACTIVITY: Distribute copies and ask participants to complete the self-assessment. Display the checklist on an overhead or flip chart during the follow-up discussion. (worksheet #1)</td>
<td>25</td>
</tr>
<tr>
<td>Leadership</td>
<td>MINI-LECTURE/DISCUSSION: Use the leadership overhead as an introduction. Use the other materials as overheads or handouts and add specific examples to some of the questions. Ask participants to contribute examples or additional statements from their own experience. (overheads #1 to #3, handout #1)</td>
<td>20</td>
</tr>
<tr>
<td>Are you on Target?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Are you Slipping?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Hints Concerning Supervision of Volunteer Programs</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervision of Volunteers</td>
<td>MINI-LECTURE/DISCUSSION: Discuss overheads #4 to #10.</td>
<td>30</td>
</tr>
</tbody>
</table>

*Make a copy for each participant.
Supervision -- Introductory Remarks

Volunteers, like salaried staff, need to know to whom they are accountable for their part in carrying out the organization's program. Therefore, a supervisor should be identified for all volunteers in each volunteer position. This could be the same person or several, depending upon the nature of the program and the variety of ways in which the services of volunteers are integrated into the organization.

The staff person supervising the volunteers should have a good understanding of the volunteers' jobs and the staff's role. Supervisors supply training, encouragement, and support to the new volunteers and should be committed to those activities. Their excitement over the potential of volunteers will play a big part in the volunteers' experience and be of ultimate benefit to the program.

The person designated as supervisor has the primary responsibility for making the volunteer feel welcomed and a part of the team. A large part of the supervisor's job is to supply motivation. The best overall strategy for supervising volunteers is to make them feel as much like salaried staff as possible. In essence, they are partners who are helping to accomplish the organization's mission. The volunteers should receive at least as much attention, support, direction, and recognition as salaried staff and, like salaried staff, they should be given real responsibility.
Rate Yourself as a Volunteer Supervisor

Answer each of the following questions, then rate your performance in each area on a 1-10 scale (10 best) and mark the five areas you will work on for improvement.

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. When was the last time you thanked a volunteer personally?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. When was the last time you made a conscious effort to recognize a volunteer by name?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. When did you last get together over lunch with a volunteer to talk informally?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. When did you last ask about a volunteer’s health or satisfaction with the job?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. When did you last give volunteers an update on developments in your agency?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. When did you last have a special event to honor your volunteers?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. When was the last time you had the executive director/board chairman talk to the volunteers?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. When was the last time you said &quot;We missed you&quot; to a volunteer who had been out sick?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. When was the last time you mentioned a volunteer in your newsletter?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. When was the last time you gave a volunteer a special thank-you such as a phone call, flowers, or a personal letter?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. When was the last time you held a meeting on a topic of special interest to volunteers?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Question</td>
<td>Answer</td>
<td>Rating</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>--------</td>
<td>--------</td>
</tr>
<tr>
<td>12. When was the last time you asked volunteers for advice on an important decision (especially one affecting them)?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13. When was the last time you honestly confronted a volunteer about a problem?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. When was the last time you had an informal review to find out what changes volunteers would like in the volunteer program?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. When was the last time you asked volunteers for suggestions about space allocations and other working conditions?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. When was the last time you had your salaried staff and volunteers together at a social event?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17. When was the last time you actually performed a volunteer's job to get in touch with a volunteer's needs?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18. When was the last time you asked volunteers for input about current or new job design?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19. When did you last have an exit interview with a volunteer and say &quot;Thank you&quot;?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The kind of recognition isn't as important as the fact that you systematically recognize your volunteers for their work. Recognition should be appropriate to the situation. The best recognition is still a sincere thank-you when a job is well done.
Leadership Is A Gift
Granted To You
By The Volunteers.

If Abused Or Misused,
It Can Be Taken Away.
Are You On Target?

Do you . . .

1. Support and fight for volunteer and salaried staff?
2. Explain deadlines in advance?
3. Admit to your mistakes?
4. Delegate to volunteer and salaried staff?
5. Give credit where credit is due?
6. Give people a chance to prove themselves?
7. Give complete and specific job instructions?
8. Provide adequate materials and equipment?
9. Make prompt, clear-cut decisions whenever possible?
Are You Slipping?

Have you . . .

1. Criticized volunteers or salaried staff in front of others?

2. Shown favoritism?

3. Blamed others for your mistakes?

4. Found fault with everything volunteer and salaried staff do?

5. Made it obvious that you are the boss?

6. Over-supervised or tried to watch everything they do?

7. Treated volunteers or salaried staff as inferiors?
Hints Concerning Supervision
Of Volunteer Programs

- Listen closely to volunteers. Are they satisfied, discontent, bored, etc.?
- Expect high-quality work from volunteers. They should be considered nonsalaried staff.
- Develop the right kind of praise for a job well done. Be creative, and don't be patronizing.
- Be flexible.
- Always be tactful and considerate.
- Be available to the volunteer. It says, "You're important."
- Make sure your leadership style is not dictatorial.
- Expect high-quality work and reward it.
- Be open to changes. Remember to be flexible.
- Don't be afraid to ask for help and input. It builds a team.
- Know your volunteers.
- Make decisions.
- Deal with conflict and settle grievances. Have a system in place that accomplishes this quickly.
- Develop and maintain an appropriate sense of humor.
Working With Volunteers

What should supervisors remember...?

- Respect volunteers as individuals
- Use good interpersonal relationship practices
- Guide volunteer activities
Supporting Volunteers

What volunteers recall about supervisors:

- Information about organization 76%
- Work description 67%
- Materials to use as a volunteer 63%
- Verbal/written thank-you 62%
- Individual assistance 54%
- Training 53%
- More challenging roles 51%
- Tasks and talents matched 47%
- Help in planning work 47%
- Feedback 46%
- Suggestions for improvement 34%

Unit 10 - Supervision

Overhead #5

Source: IVE Study, University of Wisconsin--Madison
Effective Supervisors

Which supervisors were most effective? Those who:

- Were enthusiastic

- Presented volunteer activities positively

- Respected volunteers as individuals

- Were friendly

- Remembered that volunteers work within the limits of life situations
Ineffective Supervisors

Which supervisors were least effective? Those who:

- Tried to do it all themselves
- Were disorganized
- Were not easy to contact
- Were not open to other ideas
- Lacked focus -- tried to do too many things

Source: IVE Study, University of Wisconsin--Madison
Difficulties In Working With Volunteers

What are some difficulties in working with volunteers?

- Stress
- Undependability
- Different views
- Increased isolation from clientele

Source: IVE Study, University of Wisconsin--Madison
Challenges In Working With Volunteers

What are the most challenging aspects of working with volunteers?

• Time required

• Recruitment

• Motivation

• Training

Unit 10 - Supervision

Source: IVE Study, University of Wisconsin--Madison
Clientele's Evaluation of Volunteers

What did the clientele like best about volunteers' work?

- Willingness to help
- Cooperative attitude
- Knowledge and information
- Friendliness
- Time given
- Programs delivered
- Accessibility

Unit 10 - Supervision

Source: IVE Study, University of Wisconsin--Madison
Recognition

Objectives
Participants will:

- Understand the importance of giving recognition and identify different ways recognition can be expressed.
- Review recognition policies within their agency and identify areas which may need to be improved.
- Sample recognition materials and ideas from other organizations.
<table>
<thead>
<tr>
<th>Materials</th>
<th>Suggested Presentation Technique</th>
<th>Time (min.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why Should Recognition Be Given?</td>
<td>MINI-LECTURE/DISCUSSION: Use overhead to get discussion started. Encourage comments to add to the list of reasons for giving recognition. (overhead #1)</td>
<td>10</td>
</tr>
<tr>
<td>* Recognition is Good Program Management</td>
<td>MINI-LECTURE/DISCUSSION: Stress the importance of seeing opportunities for recognition at all levels of the program. Also stress the fact that a well-run program intrinsically recognizes the contributions of volunteers. Distribute handout #1.</td>
<td>10</td>
</tr>
<tr>
<td>When Should Recognition Be Given?</td>
<td>MINI-LECTURE/DISCUSSION: Use overhead to start discussion. (overhead #2)</td>
<td>10</td>
</tr>
<tr>
<td>* How Can Recognition Be Given?</td>
<td>MINI-LECTURE/DISCUSSION: Use handout to begin discussion. Solicit and acknowledge additional ideas. Distribute handout #2 after discussion.</td>
<td>10</td>
</tr>
<tr>
<td>*Volunteer Motivation and Recognition: Some Forms of Recognition</td>
<td>GROUP ACTIVITY: Ask participants to rate their agency or one with which they will be working. Follow up with small group discussion. (worksheet #1)</td>
<td>10</td>
</tr>
<tr>
<td>Samples from agencies</td>
<td>OPTIONAL ACTIVITY: Allow time for group to review one another's recognition materials and to share ideas, answer questions, etc.</td>
<td>10-15</td>
</tr>
</tbody>
</table>

* Make a copy for each participant.
Recognition -- Introductory Remarks

It is ironic that recognition is usually discussed only in the context of a volunteer program. Salaried staff needs the same recognition. On-the-job praise is an important way to give encouragement to staff, both salaried and volunteer. Volunteers often work with salaried as part of a team. As much as possible, recognition should be given to the entire team. However, volunteers may be less sure of their value and need more reassurance and encouragement.

Make recognition a habit and be generous in giving it -- privately and publicly. It should not be a one-time thing, and you should not wait for an annual volunteer recognition reception to say "Thank you." Give recognition for the work done -- not just to the person. If volunteers are welcomed with a pleasant word, acknowledged with a smile or wave of the hand across the room and get a thank-you at the end of the job, they feel gratified. That is their fee for free services rendered. Remember, even when things seem to be running smoothly, there may be an individual volunteer whose patience is tried and whose interest is lagging. An occasional pat on the back and assurance that you appreciate their conscientious work helps counteract feelings of frustration, insecurity, and fear of failure.

Effective and meaningful volunteer involvement demonstrates your appreciation for volunteers all year. Planned recognition events cannot make up for a poor program. Teaming the personal thank-you with a quality program is a sure guarantee for strengthening all aspects of volunteer involvement.
Why Should Recognition Be Given?

• For interest shown by the volunteer

• For dependability, promptness, usefulness

• For initiative on the job

• For quality performance on the job

• For quality and continuity of service

• For extraordinary service given over and above the call of duty

• For completing a job

• For...

• For...
# Recognition Is Good Program Management

<table>
<thead>
<tr>
<th>Management Strategy</th>
<th>What This Tells Volunteers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Well-planned recruitment effort aimed at needed populations</td>
<td>We are looking for you.</td>
</tr>
<tr>
<td></td>
<td>We're asking for your help.</td>
</tr>
<tr>
<td>Complete, up-to-date applications that supply enough information to tell you if</td>
<td>We're interested in finding out who you are.</td>
</tr>
<tr>
<td>an interested volunteer might be appropriate for your program</td>
<td>What kind of person you are is important to us.</td>
</tr>
<tr>
<td>Thoughtfully developed job descriptions reflecting the true needs of your program</td>
<td>We expect great things from you.</td>
</tr>
<tr>
<td>(involving staff in developing these helps bridge gaps and build partnerships)</td>
<td>We need your help.</td>
</tr>
<tr>
<td>Sensitive screening and placement procedures matching a volunteer's time, skills,</td>
<td>We value your efforts.</td>
</tr>
<tr>
<td>and interests to suitable jobs</td>
<td>We want this to be a good experience for you.</td>
</tr>
<tr>
<td>Appropriate orientation and training providing information about your agency, its</td>
<td>We're willing to help you do your best.</td>
</tr>
<tr>
<td>role, and functions related to the volunteer's job. Workshops, films, articles, and</td>
<td>We're anxious to see you develop personally.</td>
</tr>
<tr>
<td>books are added specials</td>
<td></td>
</tr>
<tr>
<td>Accurate recording-keeping systems to include time sheets and program evaluations</td>
<td>Your contribution is worth something to us.</td>
</tr>
<tr>
<td>Ongoing supervision and support can take the form of everything from regular staff</td>
<td>Your opinion is important.</td>
</tr>
<tr>
<td>meetings to informal coffee breaks for discussing the volunteer's progress</td>
<td>We not only feel your input, we can measure it.</td>
</tr>
</tbody>
</table>

Unit 11 - Recognition

Handout #1
**Management Strategy**

Regular volunteer evaluation to let volunteers know how well they are doing, to help them plan for employment, or to prepare them for other volunteer positions.

Consistent public relations program, keeping the community aware of volunteers' accomplishments. Advocating support for your program.

Annually planned recognition, or some other effort (however big or small) specifically dedicated to saying "thank you".

**What This Tells Volunteers**

Your opinion is important. We not only feel your input, we can measure it.

We're proud of you!

You are very special. Thanks again.

---

Unit 11 - Recognition

Handout #1 continued

Source: Vancouver Bureau, 1703 Main Street, Vancouver, WA 98660

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How Can Recognition Be Given?

- Personal praise to the volunteer on the job
- Letters and postcards of thanks and informal certificates of appreciation
- Asking the advice of volunteers -- especially effective when advice is followed
- Including volunteers in planning meetings
- Identification pins, buttons, T-shirts
- Recognition of a special contribution in newspaper, on bulletin board, or in staff meeting
- Giving the volunteer more complex assignments
- Telling the "powers that be" of the volunteer's contribution (e.g., letter of recommendation that can be used as reference)
- Newspaper publicity and photos
- Special award nominations, -- invitations to annual award functions
- Promotions to new volunteer positions
- Opportunities to travel to specialized training activities
When Should Recognition Be Given?

- Regularly through special events, certificates, plaques, appreciation days, parties, dances, etc.
- On birthdays or holidays
- At meetings with other volunteers or salaried staff
- At completion of a project
- Daily
- Weekly
- When they sign up as a volunteers
- When they are ill
- When they leave
- When it’s appropriate -- Get the point?
Volunteer Motivation and Recognition

Some Forms of Recognition

Rate the following as if you were a volunteer

<table>
<thead>
<tr>
<th>Not Important To Me</th>
<th>Neutral</th>
<th>Most Meaningful</th>
<th>Extremely Important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job descriptions, carefully done</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job assignments, carefully planned</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job designed to meet agency's needs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Job designed to meet volunteer's needs</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assignments clearly given</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assignments that can have tangible results and measurable progress</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Regular assignments and work times</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adequate physical surroundings and supplies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Free coffee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Free lunch</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Reimbursement for transportation, parking, etc.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provision for child-care</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Orientation to agency</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training for assignments</td>
<td></td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Not Important To Me</td>
<td>Neutral</td>
<td>Most Meaningful</td>
</tr>
<tr>
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</tr>
<tr>
<td>Ongoing training for volunteers</td>
<td></td>
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<tr>
<td>Challenging assignments</td>
<td></td>
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<tr>
<td>Ongoing opportunities for learning</td>
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<tr>
<td>Inclusion in workshops and conferences</td>
<td></td>
<td></td>
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<tr>
<td>Inclusion in agency training</td>
<td></td>
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<tr>
<td>Inclusion in salaried staff meetings</td>
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<tr>
<td>Inclusion in salaried staff social events</td>
<td></td>
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<tr>
<td>Participation in planning</td>
<td></td>
<td></td>
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<tr>
<td>Participation in agency evaluation and goal-setting</td>
<td></td>
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<tr>
<td>Staff training in working with volunteers in partnership</td>
<td></td>
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</tr>
<tr>
<td>Personal interaction with supervisor</td>
<td></td>
<td></td>
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<tr>
<td>Personal interaction with other volunteers</td>
<td></td>
<td></td>
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<tr>
<td>Personal interaction with volunteer coordinator</td>
<td></td>
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<tr>
<td>Salaried staff knows and uses your name</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Evaluation and feedback</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Being told &quot;thanks&quot; frequently</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Being told &quot;job well done&quot; frequently</td>
<td></td>
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<tr>
<td>Being told you were missed when absent</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Event/Recognition Type</td>
<td>Not Important To Me</td>
<td>Neutral</td>
<td>Most Meaningful</td>
</tr>
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<td>------------------------</td>
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<tr>
<td>Social events, coffees, dinners</td>
<td></td>
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<tr>
<td>Yearly letter of thanks</td>
<td></td>
<td></td>
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<tr>
<td>Letter of thanks at termination</td>
<td></td>
<td></td>
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<tr>
<td>Thank-you notes</td>
<td></td>
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<tr>
<td>Certificates</td>
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<tr>
<td>Awards, pins, plaques</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Gifts</td>
<td></td>
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<tr>
<td>Recognition days or weeks</td>
<td></td>
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<tr>
<td>Contests, e.g., for best volunteer</td>
<td></td>
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<tr>
<td>Community newspaper articles about your work</td>
<td></td>
<td></td>
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<tr>
<td>In-house newsletter articles about your work or yourself</td>
<td></td>
<td></td>
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<tr>
<td>Files recording history of your work, hours, etc.</td>
<td></td>
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<tr>
<td>Recognition based on:</td>
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<tr>
<td>hours worked</td>
<td></td>
<td></td>
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<tr>
<td>level or class of work</td>
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<tr>
<td>number of clients served</td>
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<tr>
<td>money saved the agency</td>
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<tr>
<td>quality of work</td>
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<tr>
<td>Promotion within volunteer program</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Letters of reference</td>
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<tr>
<td>Name tags</td>
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</tr>
</tbody>
</table>

Unit 11 - Recognition

Worksheet #1 continued

Source: Voluntary Action Center, Eugene Oregon
Evaluation

Objectives
Participants will:

- Understand how to evaluate the volunteer on an ongoing basis.
- Identify reasons for low volunteer productivity.
- Practice linking specific performance examples to general criteria.
Lesson Plan

<table>
<thead>
<tr>
<th>Materials</th>
<th>Suggested Presentation Technique</th>
<th>Time (min.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>DISCUSSION: Ask participants to comment on usefulness and timing of volunteer evaluations.</td>
<td>5</td>
</tr>
<tr>
<td>Major Causes of Low Volunteer Productivity</td>
<td>MINI-LECTURE: Use overhead display or flip chart to discuss examples of low volunteer productivity. Solicit suggestions from participants for remedies. (overhead #1)</td>
<td>10</td>
</tr>
<tr>
<td>* Volunteer Evaluation Form Samples</td>
<td>ACTIVITY: Distribute one of the sample handouts or one of your own examples and review briefly. What indicators might be used to determine the volunteer's rating? (handouts #1 and #2)</td>
<td>15</td>
</tr>
</tbody>
</table>

* Make a copy for each participant.
**Evaluation -- Introductory Remarks**

In volunteer evaluations, the quality of the volunteer's work is reviewed to see whether it meets the agency's standards. They are the next step in an effective management strategy which includes adequate orientations, clear job descriptions and thorough training. Appraisal and evaluation should be part of ongoing supervision, not saved for certain times of the year or done only when projects have been completed. In addition, problems should be discussed as they arise and praise given liberally when it is earned.

The job description, supplemented by a formal or informal contract, should be the basis for the evaluation. The contract should spell out the expectations and goals of both parties. Performance indicators and time lines, where appropriate, will set measurable standards.

In reviewing a volunteer's performance, identify strengths, weaknesses, and areas where more training is needed. Watch for signs of boredom and work with the volunteer to add new dimensions to the job. To rekindle interest, work out a training plan which will help the volunteer improve or learn more. If the volunteer's behavior or performance has been totally unsatisfactory, establish a work improvement plan. This should have clear, measurable objectives and a timetable leading to another review. If improvement is not shown by the second evaluation, the volunteer and the agency should reconsider job placement or terminate their working relationship.
Major Causes Of Low Volunteer Productivity

1. Boredom: too much routine
2. Discontent: personality differences
3. Idleness: fluctuating workload, inefficient staffing structure
4. Lack of interest in the work
5. Ill-defined assignments
6. Inadequate supervision
7. Misunderstanding of policies and their purposes
8. Resentment, overload, unrealistic deadlines
9. Poor communication within work team
10. Emotional stress and personal difficulties

Adapted from Management Development Institute: Jack Snook, 19652 River Run Dr., Lake Oswego, Oregon, with permission
Sample 1
Volunteer Feedback Form

Date________________________

Project________________________ Supervisor________________________

Job Assignment(s)______________________________________________________

Hours Donated________________________ From___ to ___

Please rate the Volunteer Services program by checking the appropriate box. Add any notes or comments that you feel may be helpful.

1. Was the experience you received in your volunteer job(s) helpful to you?
   □ very helpful □ somewhat helpful □ not helpful

   Comments ____________________________________________________________

2. Did you feel your contribution was helpful to the organization?
   □ very helpful □ somewhat helpful □ not helpful

   Comments ____________________________________________________________

3. Was the supervision you received adequate?
   □ very adequate □ somewhat adequate □ not adequate

   Comments ____________________________________________________________

4. Was the training you received adequate?
   □ very adequate □ somewhat adequate □ not adequate

   Comments ____________________________________________________________

5. Would you be willing to repeat this assignment?
   □ very willing □ somewhat willing □ not willing

   Comments ____________________________________________________________

Unit 12 - Evaluation

Handout #1
6. Are you interested in learning about other volunteer opportunities

☐ very interested ☐ somewhat interested ☐ not interested

Comments

Do you have any suggestions that might help us improve the program?

Additional comments:

Volunteer signature (optional)

Unit 12 - Evaluation

Handout #1 continued

Reprinted with permission from Parks and Recreation Department, Portland, Oregon
Sample 2
Evaluation Form For Volunteers in Leadership Positions

Note: This is a very comprehensive form and could be rather intimidating if not used appropriately. Its best use may be as a self-evaluation instrument. It could then be used to set goals, to develop expectations, or as a tool in planning for personal growth.

Appraisal for ____________________ Supervisor ____________________
(Name of Volunteer)

Present Position ___________________________________________________

Length of time in organization _______ Period covered: From: ______ to ______
(Mo/Yr) (Mo/Yr)

Evaluation categories and suggested criteria: Specific comments on strengths and/or improvements needed:

1. Establishes measurable goals/objectives in planning work

2. Uses resources prudently and effectively

3. Plans and conducts programs suited to organization's and clients' needs

4. Works effectively with other volunteers

5. Solves problems effectively

6. Communicates well with salaried staff about program-related matters

7. Communicates effectively orally and in writing

Unit 12 - Evaluation Handout #2
<table>
<thead>
<tr>
<th>Evaluation categories and suggested criteria:</th>
<th>Specific comments on strengths and/or improvements needed:</th>
</tr>
</thead>
<tbody>
<tr>
<td>8. Allows the amount of time needed to carry out his/her responsibilities</td>
<td></td>
</tr>
<tr>
<td>9. Understands the organization’s mission and his/her part in it</td>
<td></td>
</tr>
<tr>
<td>10. Contributes, when appropriate, to program planning, implementation and evaluation</td>
<td></td>
</tr>
<tr>
<td>11. Works with organizations and individuals as a team member; provides leadership in program development</td>
<td></td>
</tr>
<tr>
<td>12. Supervises other volunteers effectively</td>
<td></td>
</tr>
<tr>
<td>13. Encourages and facilitates open communication</td>
<td></td>
</tr>
<tr>
<td>14. Delegates effectively</td>
<td></td>
</tr>
<tr>
<td>15. Makes appropriate and objective decisions</td>
<td></td>
</tr>
</tbody>
</table>

Signature of immediate supervisor: ___________________________ Date: ____________

Signature of volunteer: ___________________________ Date: ____________

Volunteer’s comments: ___________________________

Unit 12 - Evaluation

Handout #2 continued
Record-Keeping

Objectives
Participants will:

• Know why record-keeping is important.
• Design a record-keeping system for the volunteer program.
• Identify how the data will be used.
<table>
<thead>
<tr>
<th>Worksheets</th>
<th>Handouts</th>
<th>Overheads</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1 Sample 1: Volunteer In-kind Contributions</td>
<td>#1 Four Reasons to Maintain Records</td>
<td></td>
</tr>
<tr>
<td>#2 Sample 2: Volunteer Services Impact Log</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#3 Sample 3: In-kind Contributions</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#4 Volunteer Service Log</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#5 Volunteer Experience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#6 Volunteer Educational Record</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#7 Tax Deductions for Volunteers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>#8 Tax Record Sheet</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Lesson Plan**

<table>
<thead>
<tr>
<th>Materials</th>
<th>Suggested Presentation Technique</th>
<th>Time (min.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Four Reasons to Maintain Records</td>
<td>GROUP ACTIVITY: Use the overhead to brainstorm reasons to maintain records. (overhead #1)</td>
<td>10</td>
</tr>
<tr>
<td>None</td>
<td>DISCUSSION: Ask participants why they would want to keep records. Discuss the nature of volunteerism, why it is an important job and career step for many volunteers, what information is needed and how to get it, etc.</td>
<td>5</td>
</tr>
<tr>
<td>* Volunteer In-kind Contributions (Sample 1)</td>
<td>GROUP ACTIVITY: Distribute samples of record-keeping which are provided or examples from other agencies. Ask participants to work in small groups to identify the important components of a record-keeping system with a focus on information retrieval. At the conclusion of activity, ask participants to design a record keeping system to fit the needs of their organizations. (handouts #1 to #6)</td>
<td>35</td>
</tr>
<tr>
<td>* Volunteer Services Impact Log (Sample 2)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* In-kind Contributions (Sample 3)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Volunteer Service Log</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Volunteer Experience</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Volunteer Educational Record</td>
<td></td>
<td></td>
</tr>
<tr>
<td>* Tax Deductions for Volunteers</td>
<td>GROUP ACTIVITY: Discuss handout #7.</td>
<td>5</td>
</tr>
<tr>
<td>* Tax Record Sheet</td>
<td>GROUP ACTIVITY: Discuss handout #8.</td>
<td>5</td>
</tr>
<tr>
<td>* Make a copy for each participant</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Record-Keeping -- (Introductory Remarks)**

Record-keeping systems may range from what is kept in a coordinator's memory to fully computerized systems. Even a simple system will yield information that can be put to good use. The annual report on your organization's activities will benefit your fundraising and strengthen your message when you cite statistics. Volunteer recognition and awards and performance reviews could rely on records rather than on recollections. For tax deductions of in-kind contributions, for reimbursement of expenses, and for documentation regarding insurance coverage, a record-keeping system can be most helpful.

Whatever your system, it should fit the program's and the volunteers' needs, it should be practical, and it should contain just the information that is needed.
Four Reasons to Maintain Records

- The individual volunteer
- The volunteer program
- The organization
- The community

Brainstorm reasons for documentation for each of the above categories.
Sample 1
Volunteer In-Kind Contributions

<table>
<thead>
<tr>
<th>Activity</th>
<th>Number of Hours Spent</th>
<th>Number of People Reached</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Getting Background Information</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. research</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. supplemental reading</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. receiving training</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d. others (specify)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Public Contacts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. training others</td>
<td></td>
<td></td>
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<tr>
<td>b. letter writing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. phone calls</td>
<td></td>
<td></td>
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<tr>
<td>d. program publicity</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e. meeting with people (individuals, groups)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>f. others (specify)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Miscellaneous</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. state board meetings</td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. planning committees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. training team activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>d. driving time to and from activities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>e. others (specify)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Total: Number of hours spent and number of people reached</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Reprint of Family Community Leadership Volunteer Contribution Form, Oregon State University, Corvallis, Oregon
### Sample 2

**Volunteer Services Impact Log**

<table>
<thead>
<tr>
<th>Name</th>
<th>Site</th>
<th>Group</th>
<th>#Vol</th>
<th>#Hrs. Each</th>
<th>Total Hours</th>
<th>Classification</th>
<th>Total $ Value</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

**Page Totals**

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*Unit 13 - Record-keeping*
# Sample 3
## In-Kind Contributions

<table>
<thead>
<tr>
<th>Date Prepared</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of Donor</td>
<td>Program</td>
</tr>
<tr>
<td>Address of Donor</td>
<td>Month of</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td>Describe Donation</td>
<td></td>
</tr>
</tbody>
</table>

Goods were Used New

If used, indicate condition Excellent Good Fair Poor

Assigned Value Method of Valuation

### Personal Services

Description of Services

Enter number of hours contributed on appropriate date(s)

Total Number of Hours Rate Per Hour Extended Amount

### Services Other Than Personal

<table>
<thead>
<tr>
<th>Space Rental</th>
<th>sq. ft.</th>
<th>Rate</th>
<th>Extended Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Equipment Rental</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Describe Equipment

<table>
<thead>
<tr>
<th>Other:</th>
<th></th>
</tr>
</thead>
</table>

Receipt of the above goods and/or services is hereby acknowledged by the undersigned.

It is understood that this contribution □ will □ will not be counted as part of the non-federal share of in-kind contributions.

Donor Signature Date

For Receiving Agency Date

---

Unit 13 - Record-keeping

Handout #3
# Volunteer Service Log

<table>
<thead>
<tr>
<th>Date</th>
<th>JOB TITLE</th>
<th>Description of Job Performance</th>
<th>Hours Spent</th>
<th>Total Mileage</th>
<th>OTHER EXPENSES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

Source: State of Hawaii

Unit 13 - Record-keeping

Handout #4
Volunteer Experience
Documentation and Verification

Name of Volunteer__________________________ Job Title__________________________

Agency/Organization______________________________________________________________

Volunteer Address__________________________________________________________________

City__________________________ State___________ Zip__________________________

Service Record: Volunteer served from _______/_____/______ to _______/_____/______

mo. day yr. mo. day yr.

Volunteer served ___ days per week, ___ hours per day

Volunteer served a total of___________ hours

Volunteer’s Supervisor__________________________ Title:__________________________

Duties and Responsibilities: What kind of work did the volunteer do for your agency?

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________

Training: What kind of skills did the volunteer acquire through on-the-job training?

__________________________________________________________________________

__________________________________________________________________________

__________________________________________________________________________
Specific Accomplishments: What did the volunteer accomplish through performing the assigned tasks?

[Blank lines]

Verification (Please print)

[Blank lines]

performed volunteer work at

[Blank lines]

during the above mentioned-time, and assumed the duties and responsibilities of

[Blank lines]

as detailed above.

[Blank lines]

Date

Name and Title

Source: State of Hawaii
Volunteer Educational Record
Documentation and Verification Form

Name of Volunteer ___________________________ Job Title ___________________________

Agency/Organization ____________________________________________________________

Volunteer Address _____________________________________________________________

City ___________________________ State _____________ Zip ________________

Workshop/Training Title ________________________________________________________

Sponsoring Agency _____________________________________________________________

Date(s) ___________________________ Total No. of Hours __________________

Name of Instructor ___________________________ Title ____________________________

1. Topics Covered: What topics were addressed in the session(s)?

___________________________________________________________________________

___________________________________________________________________________

2. Resources/Methods Used: What kinds of materials and instructional methods were used (e.g., training manuals, slides, role-playing, etc.)?

___________________________________________________________________________

___________________________________________________________________________

3. Skills Developed: What skills, competencies, and/or knowledge were acquired as a result of the training session?

___________________________________________________________________________

___________________________________________________________________________
4. Other Comments

________________________

________________________

Verification

Instructor’s Signature

Date

Suggested Attachments: Course outline, resource materials (e.g., handouts), training manual or workbook, evaluation form, certificate of completion/participation.

Unit 13 - Record-keeping  
Handout #6

Sources  State of Hawaii
Tax Deductions For Volunteers

Volunteers may deduct out-of-pocket expenses while doing volunteer work for certain groups approved by the Internal Revenue Service.

Types of expenditures that volunteers may deduct:

- direct gifts of money to an organization
- automobile mileage and expenses
- bus and cab transportation expenses
- parking and tolls
- special uniforms
- telephone bills
- entertainment and meals given to others
- costs of meals and lodging, if away overnight
- travel expenses above per diem paid
- tickets to charity benefits, above intrinsic value
- dues, fees or assessments made to qualified organization

The following are not tax-deductible:

- value of volunteer time donated
- dependent care expenses
- volunteer's own meals (unless away overnight)
- volunteer's own entertainment

Automobile-related expenses may be deducted either at a 12 cents per mile (in 1990) standard rate or an actual expenses basis (contact IRS office for changes).

Items for which a volunteer receives reimbursement may be deducted only to the extent that actual expense exceeds amount of compensation.

A complete description of federal tax deductions for volunteers can be obtained from your local IRS office. Ask for Publication #562, Income Tax Deduction for Contributions.

For the common out-of-pocket expenses, such as transportation costs and meals, voluntary organizations can assist record-keeping by providing forms such as the Volunteer Tax Record Sheet.


Note: Regulations for tax deductions for volunteers change annually. This is only a guide. Volunteers should contact knowledgeable sources each year to determine changes.
# Tax Record Sheet

Name of Volunteer__________________________________________

Organization (complete one sheet for each organization for which you volunteer)

<table>
<thead>
<tr>
<th>Date</th>
<th>Nature of Expense (bus fare, mileage, phone calls, etc.)</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

Total

Signature of Supervisor______________________________________ Date__________

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Unit 13 - Record-keeping

Handout #8

Source: National Center for Citizen Involvement, Boulder, Colorado

174
Program Evaluation

Objectives
Participants will:

- Become familiar with one method for evaluating a volunteer program.
Lesson Plan

<table>
<thead>
<tr>
<th>Materials</th>
<th>Suggested Presentation Technique</th>
<th>Time (min.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Self-evaluation Checklist for Volunteer Program</td>
<td>DISCUSSION: Review the checklist as a possible tool for program evaluation. This section can also be used as a review of the content of the entire 14-part training workshop.</td>
<td>30</td>
</tr>
</tbody>
</table>

* Make a copy for each participant.
Program Evaluation -- (Introductory Remarks)

Program evaluation, like evaluation of the volunteer, should be an ongoing process. It is closely linked to program planning and could be considered the feedback phase of planning. Program evaluation does not have to be complex or involve advanced research techniques. Successful evaluation depends on clear, accurate thinking and common sense.

Where does evaluation fit into the overall management system? Sue Vineyard, a nationally known consultant on volunteerism, suggests that evaluation is part of the "assessment block" of her bridge. In her design, she says that there is a management process involved in an organization's going from the dream phase to the realization phase of accomplishing a goal:

Dream → Plan → Organize → Staff → Direct → Assess → Realization

Evaluation is an integral part of the process that confirms direction or suggests a change in direction or procedure. When evaluating program effectiveness, you should discuss the following questions before finalizing evaluation plans:

• Who needs the information?
• Why do they need it?
• How will you use the results?
• What information do you need and what questions will get that information?
• Who will gather the information?
• How much of your resources (time, dollars, etc.) will it cost?
• When do you need it?
<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Acceptance by Salaried Staff</strong></td>
<td></td>
</tr>
<tr>
<td>Does the volunteer program in your agency have the complete support and approval of the administration?</td>
<td></td>
</tr>
<tr>
<td>Does the entire salaried staff understand why volunteers work in the agency?</td>
<td></td>
</tr>
<tr>
<td>Are all salaried staff members familiar with the volunteers’ work and where they will be working?</td>
<td></td>
</tr>
<tr>
<td>Do salaries staff members know what to expect of volunteers?</td>
<td></td>
</tr>
<tr>
<td>Do salaried staff members realize what volunteers expect of them?</td>
<td></td>
</tr>
<tr>
<td>Have staff responsibilities regarding the volunteer program been considered and worked out?</td>
<td></td>
</tr>
<tr>
<td><strong>Recruitment</strong></td>
<td></td>
</tr>
<tr>
<td>Do you know how and where your agency is going to involve volunteers before you start recruitment?</td>
<td></td>
</tr>
<tr>
<td>Do you make your agency’s volunteer needs known through: Brochures? Newspaper articles? Radio and TV announcements? Talks to groups? Open houses?</td>
<td></td>
</tr>
<tr>
<td>Do you use a variety of sources for finding volunteers: Your board members? Friends of your volunteers? Neighborhood people? Churches? Volunteer bureau? Other?</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>-----</td>
<td>----</td>
</tr>
</tbody>
</table>
|     | Have you tried looking for potential volunteers among new population groups:  
|     | High school students?  
|     | College students?  
|     | Retirees?  
|     | Employed men and women?  
|     | Clubs and groups?  
|     | Other?  
|     | Would you consider adjustment of your program to accommodate:  
|     | The hours volunteers have available?  
|     | The particular services or skills that individuals or groups of volunteers have to offer?  
|     | Special needs of people who want to volunteer, but face personal limitations or other restrictions?  

### Interviewing and Placement

| Are prospective volunteers interviewed before they start work in your agency? |
| Is the interviewer a specifically designated and qualified member of the staff or of the volunteer organization? |
| Do you allow sufficient time and privacy for a thorough, unhurried interview? |
| Are your registration/application forms designed to furnish useful information? |
| Do you try to discover the volunteer's particular capabilities, interests, and experience -- and offer jobs that are commensurate with these? |
| Are the volunteers' preferences for placement given consideration insofar as possible? |
| Have you drawn up comprehensive and clear job descriptions? |
| When volunteers are assigned to a specific job, do they know:  
| What they are to do?  
| When, where, and to whom to report?  
| How many hours they work?  
<p>| What additional training is required? |</p>
<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is the importance of continuity of service stressed when the volunteer is working directly with clients?</td>
<td></td>
</tr>
<tr>
<td>Do you discuss a completion date for a specific assignment?</td>
<td></td>
</tr>
<tr>
<td>Do you leave a volunteer free to refuse an assignment in your agency?</td>
<td></td>
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<tr>
<td>Are volunteers who cannot find the placement they want directed to another agency?</td>
<td></td>
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<tr>
<td>Can you turn down a volunteer who is unsuitable?</td>
<td></td>
</tr>
<tr>
<td><strong>Orientation and Training</strong></td>
<td></td>
</tr>
<tr>
<td>Are time and personnel for the orientation of volunteers included in the planning of your volunteer program?</td>
<td></td>
</tr>
<tr>
<td>Do all volunteers working in your agency understand why their work is necessary and how it fits into the agency's services or operation?</td>
<td></td>
</tr>
<tr>
<td>Are volunteers given a place to work and to keep their belongings?</td>
<td></td>
</tr>
<tr>
<td>Are volunteers introduced to salaried staff members and volunteers with whom they will be working?</td>
<td></td>
</tr>
<tr>
<td>Do volunteers know what is expected of them in:</td>
<td></td>
</tr>
<tr>
<td>Performance?</td>
<td></td>
</tr>
<tr>
<td>Appearance?</td>
<td></td>
</tr>
<tr>
<td>Behavior?</td>
<td></td>
</tr>
<tr>
<td>Confidentiality?</td>
<td></td>
</tr>
<tr>
<td>Attitude toward clients?</td>
<td></td>
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<tr>
<td>Agency policy?</td>
<td></td>
</tr>
<tr>
<td>Can volunteers differentiate between the role of volunteer staff and that of salaried staff?</td>
<td></td>
</tr>
<tr>
<td>Have you prepared manuals or other printed instructions to help volunteers review what they need to know?</td>
<td></td>
</tr>
<tr>
<td>Do you acquaint volunteers with all of the agency's facilities and with the names of its various department heads?</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
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</tr>
<tr>
<td>Are volunteers sufficiently informed about the agency’s purpose, program, and philosophy to explain them to their families and friends?</td>
<td></td>
</tr>
<tr>
<td>Do you give volunteers an opportunity to acquire the skills needed for a particular assignment through: Formal training programs? On-the-job instruction?</td>
<td></td>
</tr>
<tr>
<td>Have you explored community resources for types of training that your agency is unable to provide?</td>
<td></td>
</tr>
<tr>
<td>Do you keep the orientation process from becoming passive through: Periodic volunteer meetings? Discussion sessions? Invitations to pertinent workshops? Suggested reading material?</td>
<td></td>
</tr>
<tr>
<td>Assimilation</td>
<td></td>
</tr>
<tr>
<td>Do you make it evident that volunteers are needed and wanted in your organization?</td>
<td></td>
</tr>
<tr>
<td>Are volunteers regarded as important partners in the organization’s activities and programs?</td>
<td></td>
</tr>
<tr>
<td>Are volunteers kept informed of the organization’s news and any changes in the organization’s program?</td>
<td></td>
</tr>
<tr>
<td>Do you invite your volunteers to take part in: General meetings? Staff meetings? Anything the organization does as a whole? Planning meetings?</td>
<td></td>
</tr>
<tr>
<td>Are volunteers encouraged to make suggestions and do their ideas receive careful attention?</td>
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<tr>
<td>Do your volunteers feel so much a part of the organization that nothing short of absolute necessity will keep them away from the job?</td>
<td></td>
</tr>
<tr>
<td>Do you feel it is important to most people to be told that their efforts are appreciated?</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
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<tr>
<td>-----</td>
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</tr>
</tbody>
</table>
| **Does your agency make a point of saying "thank you" to its volunteers:**  
  Informally and personally - on a day-to-day basis?  
  Formally and publicly - in the presence of fellow workers, staff, clients, board members, family and friends?  |
| **Are the volunteers in your organization identified on the job so that clients or other volunteers, as well as salaried staff, may know who they are and why they are there:**  
  By badges?  
  By uniforms?  |
| **Is any of your organization’s publicity devoted to telling the story of your volunteers’ achievements?**  |
| **Does your organization have a formal recognition system which uses the most meaningful methods of recognition for the diverse groups of volunteers?**  |

**Supervision**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td><strong>Has your organization designated one person, salaried staff member or volunteer, as the overall director of the volunteer program?</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Is the decision tree or accountability flow in your volunteer program clear?</strong></td>
<td></td>
</tr>
</tbody>
</table>
| **Do volunteers know to whom they are immediately responsible:**  
  To report for work?  
  To turn to for help and advice?  
  To call when unable to be present?  |
| **Do they know when and where they can find their supervisor?**  |
| **Is there always some experienced person available to work with new volunteers and show them what to do?**  |
| **Do you keep track of how volunteers are getting along in their jobs:**  
  Through an adequate system of records?  
  Through personal conferences?  
  Through contact with the supervisory personnel?  |
<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you let volunteers know when they are doing well?</td>
<td></td>
</tr>
<tr>
<td>Do you try to help the volunteer who is not doing well by building up skills, increasing interest, and instilling confidence?</td>
<td></td>
</tr>
<tr>
<td>Are the channels of communication always open between you and the volunteers?</td>
<td></td>
</tr>
</tbody>
</table>

**Assignment**

| Are volunteers assigned to a specific job and can they continue, be reassigned, or withdraw after a trial period? |
| Do you consider inappropriate placement in looking for causes of low productivity and do you try to give volunteers another opportunity for using their skills? |
| Do volunteers feel free to terminate their service with the agency after a reasonable length of time? |
| Do you make sure that all volunteers, whether they retire after long service or after a short unsatisfactory experience, leave with a pleasant feeling toward the organization? |

**Evaluation**

<p>| Does your total plan for organizational operation include a periodic review of the volunteer program? |
| Do you evaluate the program section in which they work as well as the performance of the volunteers? |
| Are volunteers an asset to your organization in the sense that they have: |
| Enriched your existing program? |
| Made possible the extension of services? |
| Made possible the inauguration of new services? |
| Served as first-rate public relations people? |
| If volunteers appear to be a liability, have you considered any new approaches that might change that? |</p>
<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>
| In evaluating the volunteer program, do you include:  
  A look at the structure as well as the content?  
  An assessment of salaried staff time measured against volunteer performance?  
  A discussion of problems encountered? |
| Do salaried staff and administration as well as the volunteers themselves participate in the overall evaluation? |
| Have you considered calling in an outside expert in order to keep the evaluation objective? |
| Are you prepared to receive the recommendations of an objective evaluation and adopt them to some extent in your organization? |
| Do your staff members:  
  Attend workshops on volunteers?  
  Talk to volunteer supervisors from other organizations or areas of service? |
| TOTAL |
Resources
### Resources

<table>
<thead>
<tr>
<th>Resource</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Journals</strong></td>
<td>Hanlon, Brenda, editor. &quot;Voluntary Action Leadership.&quot; Published quarterly. Volunteer -- The National Center</td>
</tr>
<tr>
<td></td>
<td>Honer, Anne S., editor. &quot;Journal of Volunteer Administration.&quot; Published quarterly. Association for Volunteer Administration, P.O. Box 4585, Boulder, Colorado 80306</td>
</tr>
<tr>
<td><strong>Video tapes</strong></td>
<td>Extension USDA. &quot;Extension and Volunteers.&quot; September, 1986. 15:34 minutes. Overview of: valuable partnerships, Extension and volunteers; enhancing Extension volunteer programs; director's thank you</td>
</tr>
<tr>
<td><strong>Moore, Larry F. 1985.</strong></td>
<td>Motivating Volunteers. Vancouver Volunteer Centre, Vancouver BC, Canada</td>
</tr>
<tr>
<td><strong>Vineyard, Sue. 1984.</strong></td>
<td>Marketing Magic for Volunteer Programs. Heritage Arts Publishing, 1807 Prairie Avenue, Downers Grove, Illinois 60515</td>
</tr>
<tr>
<td><strong>Vineyard, Sue. 1987.</strong></td>
<td>How to Take Care of You... So You Can Take Care of Others. Heritage Arts Publishing, 1807 Prairie Avenue, Downers Grove, Illinois 60515</td>
</tr>
<tr>
<td><strong>Wilson, Marlene. 1979.</strong></td>
<td>Effective Management of Volunteer Programs. Volunteer Management Associates, Boulder, Colorado</td>
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<td><strong>Hanlon, Brenda, editor.</strong></td>
<td>&quot;Voluntary Action Leadership.&quot; Published quarterly. Volunteer -- The National Center</td>
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</tr>
</tbody>
</table>
Video tapes (cont.)

Educational Materials/Pamphlets

Extension USDA. "Orientation for Volunteers in Extension Service." September 19, 1986. 90 minutes. Overview of an orientation program developed by Extension, USDA.

Georgia Center for Continuing Education. "Re-inventing the Board: Strategic Leadership for Public and Nonprofit Governance." National Video Teleconferences, with workbook. 160 minutes -- includes time for participant activities.


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