



VOLUNTEER MANAGEMENT

Dear Colleague,

On behalf of the National Minority AIDS Council (NMAC), thank you for picking up this manual and taking a step toward increasing your capacity in this struggle. As we enter the third decade of HIV/AIDS, it is more important than ever to develop our skills and knowledge to better serve our communities and our constituents.

NMAC, established in 1987 as the premier national organization dedicated to developing leadership within communities of color to address the challenge of HIV/AIDS, works to proactively produce and provide skills-building tools for our community. One such tool for the manual that you hold in your hands.

The Technical Assistance, Training and Treatment Division's mission to build the capacity and strength of community-based organizations, community planning groups for HIV prevention and health departments throughout the United States and its territories is supported through a multifaceted approach. This approach includes individualized capacity-building assistance, written information (manuals, publications and information provided through NMAC's website and broadcast e-mail messages) and interactive learning experiences (trainings). All components are integral to providing a comprehensive capacity-building assistance experience, as opposed to offering isolated instances or random episodes of assistance.

After undergoing a revision of existing curricula and publications and an expansion of our current catalog of subject areas to include more organization infrastructure topics, NMAC is proud to present you with this new manual, Volunteer Management. One of 15 topic areas in which we provide capacity-building assistance, this manual will provide you with detailed information, resources and the knowledge to enhance your capacity to provide much-needed services in your community.

Our hope is that this revised manual will give you the skills and knowledge to increase your capacity and serve your community at a greater level than ever before. Please feel free to contact us if you would like further information on other services we can provide to you and your community.

Yours in the struggle,

A handwritten signature in black ink, appearing to read 'Paul Akio Kawata'. The signature is stylized and fluid, with a large initial 'P' and 'K'.

Paul Akio Kawata
Executive Director

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Preface

Organizational Effectiveness

Successful community-based organizations (CBOs) can attribute their success to employing 15 key components that support organizational effectiveness. See the model below.

Ongoing learning and training in each of these areas will allow your organization to meet the needs of your constituents.

For information regarding training in any of these areas, contact the National Minority AIDS Council's Technical Assistance, Training and Treatment Division by telephone at (202) 234-5120 or by e-mail at ta_info@nmac.org.

ORGANIZATIONAL EFFECTIVENESS MODEL



Purpose

Staff turnover at community-based organizations has grown high in recent years. The competition for both financial and human resources has reached an all-time high as well. During these times of limited resources, the use and management of volunteer services has become critical for success in many CBOs. The purpose of this training manual is to offer guidelines for effectively recruiting, training and managing volunteers. This manual is divided into three main units: Program Design, Program Management and Program Evaluation.

Learning Objectives:

By the end of this manual, learners will be able to:

- ✓ Assess organizational needs for program development.
- ✓ Establish job descriptions for volunteers.
- ✓ Recruit volunteers to work with HIV/AIDS community-based organizations.
- ✓ Supervise and retain volunteers.
- ✓ Identify formal and informal methods of volunteer recognition.
- ✓ Develop evaluation mechanisms to improve a volunteer-management program.

VOLUNTEER

Anyone who without compensation or expectation of compensation, beyond reimbursement of expenses incurred in the course of volunteer duties, performs a task at the discretion of and on behalf of the organization.

Introduction

Volunteering is giving time and talent to help solve problems. It comes in response to the human need to give and it forms partnerships to improve the health, harmony and economic strength of communities. Volunteering helps makes our society and the system it governs work more smoothly. Volunteerism has served as the cornerstone of American independence since the early days of this nation. According to the Independent Sector's report "Volunteering and Giving in the United States, 2001," 44 percent of adults are annual formal volunteers. Sixty-nine percent of adults volunteer on a regular basis. The value of Americans' volunteer time in 2001 climbed to \$16.05 per hour, up from \$15.39. This value is based on average hourly earnings for private non-agricultural workers as published in the *Economic Report of the President, February 2002, Washington DC.*¹

In most nonprofit organizations, everyone is busy, with little time for extra tasks — even those that are supposed to make your job easier. But there are clear benefits to be gained by using volunteers. Achieving those benefits will require additional work on your part and a reallocation of how you use your time. The challenge is to find the extra time to support the effort and empower the volunteers to coordinate their own activities. A decision to use volunteers should be based not on current time constraints but on the long-term overall benefits to your organization and the furthering its mission.

Benefits of Using Volunteers

The most commonly cited benefits from using volunteers include:

- ✓ Freeing staff to have more time for in-depth programming and/or expansion of activities and services offered.
- ✓ Contributing financially valuable amounts of work.
- ✓ Building networks to bolster support at the local, state, regional and national levels.
- ✓ Building a strong support base.
- ✓ Giving staff time to increase their level of expertise in their subject areas.
- ✓ Freeing staff to have more contact with clients.

1. "Economic Report of the President," February 2002. Washington D.C.: US Government Printing Office.

Time Commitment

As with the implementation of any new program or task, your initial time investment to launch a volunteer program will be high. In the case of most volunteer-training programs, your CBO will be directly involved with planning and conducting training sessions and will support creating the structure of the volunteer group. Ideally, as the program progresses, the various tasks associated with coordinating volunteers will shift to the volunteers themselves. This is where empowerment comes in. Although the amount of time needed for maintenance may seem high, remember your time is magnified by the assistance provided by the volunteers themselves.

Pre-training Assessment

The Pre-training Assessment on the next page is a way to check your knowledge against the information addressed in this manual. The correct responses are located on page 58.

We encourage you to use this manual to learn new information and receive feedback on challenges you may be experiencing while managing your volunteer program.

Pre-training Assessment

Please circle the following statements True or False.

1. **True** **False** The organization's needs should be assessed before volunteers are recruited.
2. **True** **False** Job descriptions help reduce conflicts that may arise between staff and volunteers.
3. **True** **False** Volunteer records should be maintained only for the duration of the volunteer task.
4. **True** **False** Volunteer recruitment should focus only on fulfilling the needs of the organization.
5. **True** **False** Recruitment messages should have three parts: statement of need, job description and benefits.
6. **True** **False** The Volunteer Protection Act provides certain protections to volunteers, nonprofit organizations and governmental entities in lawsuits based on the activities of volunteers.
7. **True** **False** Motivating volunteers involves creating a volunteer experience that allows an individual to meet their motivational needs in ways that are productive for the organization and satisfying for the individual.
8. **True** **False** The main difference between managing and resolving conflict is that managing conflict involves getting control of the situation without getting rid of the situation.
9. **True** **False** Retention of volunteers should focus on the first six months of a volunteer assignment and anniversaries of the volunteers.
10. **True** **False** Recognition of volunteers may involve formal or informal methods.
11. **True** **False** Evaluations help identify strengths and weaknesses of the volunteer program and the volunteers.
12. **True** **False** An evaluation can examine one of three aspects of a program — its process, its results or its broad impact — or any combination of these elements.
13. **True** **False** Formative evaluations are conducted to determine the degree to which project goals and objectives have been achieved.
14. **True** **False** Volunteers should know what they will be evaluated on before they start working.

UNIT 1:

Volunteer Program Design

Purpose:

In this unit we examine basic volunteer program design elements. This unit also describes what volunteer assistance can accomplish and how to determine whether a given community is ready for volunteers. It also outlines the goals and objectives necessary for planning volunteer programs.

Learning Objectives:

By the end of this unit, learners will be able to:

- ✓ Design an appropriate needs assessment tool.
- ✓ Determine who should be included in the needs assessment process.
- ✓ Explain the difference between a goal and an objective.
- ✓ Develop goals and objectives for volunteer programs.
- ✓ Write a volunteer job description.

I. Assessing Organization and Community Needs

Before launching a new program or expanding an existing program, it is a good idea to complete a needs assessment. Assessing the needs of your organization is an important step in your management program. This step allows you to bring in all relevant constituents to determine where the organization is and what you think the next steps should be in program planning. This process should include board members, staff and other constituents associated with your organization. You may want to design your own set of indicators or use resources already available.

Some Organizational Questions to Ask:

- ✓ Do the organization's purpose and activities meet community needs?
- ✓ Does the organization have a value statement that is reflected in its activities and communicated by its constituents?
- ✓ Have the board and staff developed and adopted a written strategic plan to achieve the mission of your organization?

Some Programmatic Questions to Ask:

- ✓ Does the staff have sufficient training and skill level to produce the program?
- ✓ What do clients want?
- ✓ How many people need this program?
- ✓ Is anyone else providing this service?

Some Evaluation Questions to Ask:

- ✓ Does the organization evaluate its activities annually to determine progress toward accomplishing its goals?
- ✓ Are stakeholders involved in the evaluation process?

Ranking the results of the assessment will show which areas are the highest priority and which ones are the lowest priority. You can judge the appropriateness of a volunteer program in a community by answering the questions² on the next page.

EVALUATE

To determine the value of something.

GOALS

Measure used to specify the tasks one plans to accomplish by the end of the project.

2. Oregon State University Extension Service Volunteer Program Training Guide

	Yes	No	What's Needed to Change 'No' to 'Yes'?
Is there a need for volunteers?			
Can the need be translated into clearly defined jobs for volunteers?			
Are salaried staff roles and volunteer roles clearly defined?			
Is the salaried staff comfortable with the role of volunteers?			
Can staff be released from other responsibilities to coordinate volunteers?			
Has the salaried staff been involved in the planning?			
If volunteers are already involved informally, have they also been included in planning?			
Can the tasks identified for volunteers survive volunteer turnover?			
Can salaried staff time be allocated for supervising volunteers?			
Do you have time and funds allocated to supervise and train volunteers?			

II. Developing Goals and Objectives

Goals clarify your mission. They also specify the tasks you plan to accomplish by the end of your project. Objectives describe the minimum measures required to meet your goals and to define the success of your program. An example of a goal is: "To increase the knowledge of HIV/AIDS risk factors among youth." An example of an objective to meet this goal is: "To provide a minimum of 52 weekly sessions from October 2002 through September 2003 on the effects of unprotected sex for youth ages 12–17."

In the realm of volunteer programs, goals and objectives are essential because they clarify the purpose of volunteer services and help ensure a smooth operation. They also

provide a gauge for measuring the success of volunteer programs. Goals and objectives can be either short-term (such as the effects on the volunteers immediately following the training) or long-term (the effects this training will have on the program over the next several months or more). The objectives should be observable and measurable.

To develop goals for a volunteer program, you should answer the following questions:

- ✓ Why do you want a volunteer program?
- ✓ How will you handle the volunteer program?
- ✓ When will you launch the volunteer program?
- ✓ Who will be responsible for running the volunteer program?
- ✓ How will you know when the program is developed?

The following chart aids in clarifying the purpose, goals and objectives of potential volunteer programs. Fill it out using details appropriate to your organization.

Volunteer Activity	How Activity Will Be Performed	Who Will Be Responsible	Due Date	How We Will Evaluate

III. Establishing Job Descriptions

For effective recruitment, orientation and supervision of volunteers, you need a job description. This is one of those details that people like to skip because it takes time and thought. It's not very exciting but it can make the exciting part go much smoother. Without a volunteer job description, you could feel overwhelmed and frustrated by the task of keeping volunteers motivated. Volunteers could have similar feelings of frustration and decide to drop out.

Job descriptions help clarify what is expected of the volunteers from the beginning. They can also help reduce conflicts that may arise between staff and volunteers. (Additional information on handling conflicts will be discussed in the section on program management.)

Ask these questions as you develop a volunteer job description:

- ✓ Is this a real job? Can its usefulness be made clear and concrete to volunteers?
- ✓ Can this job be done on a part-time basis?
- ✓ Will time required for training and supervision be in proportion to the volunteer time needed in actual service?
- ✓ Can staff support be provided if needed?
- ✓ Can staff work adjustments be made if the volunteer's other priorities make this necessary?
- ✓ Does the job consider the varied interests and skills the volunteers bring and the value of any community relationships?
- ✓ Are there possibilities for volunteer satisfaction in doing this job?
- ✓ Can you imagine someone really *wanting* to do this job?

If these questions can be answered, then you are ready to develop the job description. If these questions cannot be answered, then you may want to review your goals and objectives and revise them accordingly. Below is a format to use to develop a volunteer job description.

Sample Format for Volunteer Job Descriptions

Title: Fill this out last.

Major Objectives: State the goal of service to be performed and its relationship to the agency.

Major Responsibilities: List specific duties and responsibilities of the volunteer's job.

Qualifications: List any skills, education or personal qualities needed to perform the job. If a car is needed, indicate that here.

Training/Preparation: This section details orientation and training required before starting the job or after the job has begun. Include the amount of time that will be allowed for it.

Time and Place: The number of hours and days of the week the volunteer is needed, and the place where the volunteer will perform the job.

Length of Commitment: Give the minimum and maximum length of commitment for the volunteer.

On-the-job Supervision: State the type of supervision that will be provided for the volunteer's job.

Benefits: List any expenses that will be paid or materials provided.

Name/Title of Supervisor: Name of staff member with direct responsibility for this position.

Job descriptions will change as the need for volunteer assistance changes. Focus on one job description at a time to better target your recruitment efforts.

UNIT 2:

Program Management

Purpose:

This unit describes the areas of program management and offers suggestions for developing them, emphasizing recruiting, supervising, retaining and training volunteers. It also offers a definition of the difference between managing conflict and resolving conflict.

Learning Objectives:

By the end of this unit, learners will be able to:

- ✓ Target recruitment efforts.
- ✓ Explain the three parts of a recruitment message.
- ✓ Identify ways to recruit, retain and recognize volunteers.
- ✓ Explain the Volunteer Protection Act.
- ✓ Describe the importance of risk management.
- ✓ Identify ways to motivate volunteers.
- ✓ Explain the difference between managing conflict and resolving conflict.
- ✓ Establish a volunteer record-keeping system.
- ✓ Develop a volunteer orientation process.

I. Recruiting Volunteers

Getting people to support a cause by giving their time is an ongoing challenge for most nonprofit organizations. It's recommended that you appoint a volunteer manager to serve as the liaison among the volunteers, staff and public. The volunteer manager also will help the staff understand the need for volunteers, the costs associated with volunteers and the commitment required from both staff and volunteer perspectives, which should be discussed prior to starting the volunteer recruitment campaign.

Ask the following questions as a guide for launching your recruitment campaign:

A. Who Are We Trying to Recruit?

In trying to fill volunteer positions, focus first on which specific skills, interests, viewpoints, prior experiences, personality traits and resources you need. Make a list, then focus on the top two or three items.

Your objective is to match the needs of the position with the skills and interests of the individual. People tend to respond favorably to an appeal to their unique abilities and interests. Having decided what is needed and who would be well-suited to that type of position, you are now, and only now, ready to recruit volunteers.

Recruiting is easier if you have some particular types of people in mind, because that lets you target your message to the needs of that group. Conversely, messages sent to the general community have to apply to everyone and often wind up speaking to no one.

Decide who in your organization is best suited to coordinate the recruitment campaign. Look for someone who is enthusiastic and knowledgeable about the work of your organization.

In drafting your recruitment message, use a personal appeal; indicate in very specific terms what someone would gain from joining your organization as a volunteer. Indicate how particular interests, hobbies, skills, prior experiences, contacts and personality would be well suited to volunteering.

Clearly and honestly explain what type of tasks are involved, how much time volunteering requires, and what is expected. Do not downplay the time or tasks involved. We often tell people, "It won't take much time," and then complain afterwards when they do not give it much time.

Clarify your expectations. People are reluctant to take on tasks for indefinite periods of time. When your request includes a specific time commitment, the response is often, "Oh, if that is what you want, I can handle that." If you find that everyone is turning you down, go

back to the drawing board and redefine the position to make it more realistic and attractive in terms of tasks and time commitment.

Be positive. Focus on the personal benefits to be gained from serving as a volunteer. Convey your own enthusiasm and commitment to the project. If you are not excited, it is hard to excite others. The way you recruit clearly conveys how important you feel the position is. Casual and careless recruitment will likely lead to casual and careless participation.

B. Where Will We Find Volunteers?

In identifying the types of people you're seeking and where they might be found, you move toward identifying the circles of people you want to reach to present your message. Word of mouth can be one of the best ways to recruit volunteers. Ask board and staff members for help or suggestions about where to find volunteers. Current volunteers also are excellent recruiters if their experience has been rewarding. And people who are familiar with your organization and its work can also offer suggestions because they know your "product."

Target your audience as much as possible to assist with matching skills and interests to the needs of your organization. You may need a volunteer to assist with activities for children of parents living with HIV/AIDS. Likely places to look for volunteers include: students majoring in counseling, health-related areas, youth development, local health departments and hospitals.

C. How Should We Communicate with Them?

In general, the most effective means of recruiting volunteers are those in which two-way communication is possible. Information and orientation meetings, courses, speaking engagements and one-to-one appeals are effective recruitment techniques because of their direct, personal nature. Another way to communicate your message is to offer a course to the public on what your organization does. This not only serves as a first step in training new volunteers, but also provides a significant service to the community and has public relations value for the organization. You could offer a course on "Counseling for Children of HIV/AIDS Parents," for example. Throughout the course you can talk about your volunteer program and have information available at the end of the session.

Recruitment messages should have three parts:

- 1) Statement of Need:** Most recruiting messages seldom talk about why we want the person to do a certain job. They only talk about the activities the person will perform. By including a statement of need, people know how they can help solve a problem rather than merely doing some activity. Rather than saying, "Our center needs volunteers to tutor children," it is better to say, "Many children are failing in school because of a lack of affordable after-school/tutorial services." The statement of need prompts a potential volunteer to think, "Somebody ought to do something about that."

- 2) **Job Description:** Your message will be more powerful if you describe tasks and activities in terms of the need because not everyone will be able to figure out why such activities are important. For example, volunteers will provide one-on-one tutoring to youth to reduce the tutor/student ratio. This will give the youth greater assistance in improving academic performance
- 3) **Benefits:** Doing something worthwhile is not the only reason why people volunteer. Your message should show potential volunteers that other needs could be met by doing volunteer work at your organization. For example, experience will be gained in team-building, conflict resolution, effective communication and networking. This will also help reduce turnover and burnout.

Sample:

JOB ANNOUNCEMENT — MEDIA RELEASE

To: Jackson Daily News
From: ABC Organization
123 Main Street
City, State ZIP
(333) 333-3333
Jane Ross, Volunteer Coordinator

For Immediate Release

October 1, 2002

Volunteer Typist Needed

ABC Organization needs someone with good typing skills to volunteer four hours per week in the office to type, file and keep our mailing list up-to-date. ABC Organization is a treatment center for HIV/AIDS patients serving the entire county. ABC will provide orientation and training for the job. Call Jane Ross at (333) 333-3333 for more information.

For written recruitment efforts, try a “job announcement” in the local paper.

Volunteer managers must make good use of marketing techniques to ensure that volunteer work competes with all the other ways people can spend their free time. Know to whom your volunteer jobs appeal and why, then use that information to decide where to recruit and which methods to use. This may sound like manipulation, but it’s not. It’s marketing: Your organization has something to offer potential volunteers and your message and materials should state your case honestly and directly.

A year-round public relations program is a valuable adjunct to any successful recruitment drive. The more visible your name, the better.

Thirty-Five Recruitment Ideas³

1. Offer presentations illustrating clients being served by volunteers at neighborhood association meetings.
2. Offer a program for large companies on ways to volunteer in your organization for use in their pre-retirement seminars.
3. Talk to the manager of your local cable TV program at a high school or college station about an opportunity to present a program on your organization.
4. Never leave a meeting where you have given a talk about your organization without getting the name and contact information of everyone interested.
5. When you make a presentation to a large group, take several volunteers with you.
6. Get lists of other organizations in your area to see if they can help your recruitment effort.
7. Research clubs, groups and schools that include among their activities a project similar to the work of your organization.
8. When speaking with potential volunteers, consider ways to focus the message on your client needs, not your organizational history.
9. Work with other volunteer groups in your community to sponsor a volunteer fair at a mall or local company.
10. Ask your newspaper to donate space in its classified ad section for volunteer job openings.
11. Ask churches to announce your volunteer needs to their congregations.
12. Contact high school and college department heads to see if volunteering with you can become a part of a class assignment.
13. Talk to personnel directors of companies to see if they can direct retirees and current employees to you.
14. Create a "Resource Inventory" file of groups, individuals, media and businesses.
15. Don't forget that you can recruit whole groups of volunteers to help you with a project.
16. When trying to involve minorities, find leaders in that community to help you recruit.

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3. Adapted from Voluntary Action Leadership, Summer 1986

17. When trying to enlist teachers, pastors or community leaders, ask one of their colleagues or members to help persuade them.
18. Speak the language of the person you are trying to recruit. For example, if you are trying to recruit college students, explain how their volunteer experience can be good for gaining related work experience and establishing networks in their field of study.
19. When trying to recruit a group, look at its creed or mission and use some of its wording in your presentation. Some of these groups may include the Girl Scouts or college organizations.
20. When enlisting others, always tell why you are personally committed to your work.
21. Always recruit volunteers on the basis of the service to clients.
22. When trying to recruit businesses, look up their advertising slogan and build it into your presentation.
23. Tell people what they will do, how long they will be expected to do it. Talk about who will benefit.
24. Remember that you are trying to encourage volunteers to say “yes” — not twist their arms into volunteering.
25. Never use guilt when trying to recruit.
26. Be honest and up front with people when trying to recruit.
27. Avoid “first warm body through the door” methods of recruitment. Do not accept the first person who comes by. They may not have the qualifications you are seeking.
28. Ask grocers to stuff flyers about your program into grocery bags.
29. Explain large volunteer jobs by breaking the tasks involved into smaller components.
30. Be careful about recruiting people to titles without explaining the actual job functions and responsibilities.
31. Diagram where people will fit into the overall pattern of work.
32. ALWAYS offer a job description — even if it’s a simple, one-sentence sketch of the work to be performed.
33. Don’t recruit until you know what you are doing and what the volunteers are going to be doing.

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34. Appeal to your current volunteers to recruit their friends.
35. Ask the local chamber of commerce to disseminate material to newcomers about your organization and its needs.

D. Risk Management

Insuring Volunteers

Given the millions of volunteers and the thousands of different roles they play, it is inevitable that on occasion, a volunteer will be injured while serving a nonprofit organization. Whether the nonprofit can be held liable for the injury is related to a number of factors that include:

RISK MANAGEMENT

A discipline for dealing with the possibility that some future event will cause harm.

- ✓ **Age of the volunteer.** If the volunteer is younger than 18, the organization generally assumes some responsibility for the welfare of the volunteer, unless a specific release of liability has been signed by the volunteer's parents, legal representative or another organization. The execution of a legally enforceable release does not, however, preclude a suit by the minor or by the parent in the name of the minor.
- ✓ **Representations made to the volunteer when he or she was recruited.** Your organization should inform volunteers about any provision the organization has made for handling injuries. If your organization expects volunteers to be responsible if they are injured while performing volunteer service, that expectation should be clearly conveyed to the volunteer from the outset. Many organizations require that volunteers sign an agreement that transfers responsibility for any injuries incurred in the course of a volunteer's duties to the volunteer. Such agreements must clearly and unambiguously explain the nature of the risks being assumed by the volunteer because they will be closely scrutinized by the courts. Moreover, it is highly unlikely that responsibility for injuries relating to the gross negligence or intentional wrongdoing of an organization can be transferred to the volunteer by mutual agreement.
- ✓ **Degree of control exercised by the organization over the volunteer.** In a recent legal case involving a church group performing repairs to a summer camp, the court found that the camp was not responsible for injuries to a volunteer who was working on a bridge because the volunteer, not the camp, selected the specific project. Control of volunteers can be a double-edged sword, however. While exercising little or no control over a volunteer may reduce the likelihood of a successful claim, it may actually increase the risk of a claim by a third party who is injured by the volunteer's actions.
- ✓ **Circumstances of the particular accident.** Underlying all action is the duty to act reasonably and prudently, a duty that is created as soon as some action is initiated. If an organization provides equipment, there is a duty to take reasonable steps to provide equipment that is sound. In addition, there may well be duties to train the volunteer in how to use the equipment because misuse may be foreseeable. For example, if a

volunteer uses a stepladder belonging to the organization that cannot be extended to the last rung or placed at too flat an angle, a volunteer without experience should receive instruction in proper use of the ladder.

- ✓ **If the volunteer was injured while volunteering for a project sponsored by his or her employer.** Corporate volunteerism is growing, along with the need to clearly understand the relationship between the volunteer and employment status. The more closely a corporate volunteer's activities are connected to his or her employment status, the more likely the employer will be held liable for the volunteer's injuries.

Insuring Volunteers Against Accidents or Injuries

There are two primary options that an organization should consider if it wants to insure volunteers against the possibility of physical harm incurred in the course of volunteer service on behalf of the organization: a volunteer accident-injury policy and workers' compensation coverage. Each of these options is discussed below.

- ✓ **Accident and Injury Policies.** Accident and injury coverage for volunteers pays for the cost of medical treatment for volunteers who are injured while delivering services for the organization. These policies usually pay the costs of emergency room services and follow-up treatment up to pre-determined limits based on the kind of injury. For example, a broken leg may have a limit of \$2,500, while an eye injury might be limited to \$1,500 unless the injury resulted in the loss of sight, in which case the limit might be \$15,000. (These amounts are hypothetical and intended for illustrative purposes only.) Usually these policies do not have deductibles. Note that an accident and injury policy for volunteers does not respond to illness nor does it protect the organization from liability for the injury.

One distinctive feature of an accident and injury policy is that it will pay a claim regardless of who is at fault. These policies are often excess insurance, meaning that they pay only after other available insurance — generally the volunteer's personal health insurance — is exhausted. If the volunteer is uninsured, the accident and injury policy would "drop down" and become primary coverage for the injury.

- ✓ **Workers' Compensation.** Some states permit the inclusion of volunteers in a nonprofit's workers' compensation program. On the surface, this appears to be an easy answer to the dilemma of paying for treatment of injured volunteers. Organizations are required to carry this coverage for their employees, and it may be administratively less cumbersome to simply add volunteers to an existing policy.

Workers' compensation policies may not, however, be the most effective way for a nonprofit to protect its volunteers. Workers' comp for employees includes a number of benefits for which volunteers would not be eligible — reimbursement for lost wages, for example. In addition, workers' comp premiums are based on the type of work performed and not the amount of time spent on the job. For example, the cost of insuring a patrol officer may be comparable to the cost of insuring a part-time police department volunteer who patrols a community as part of a crime deterrence effort.

In addition, actual losses under workers' compensation policies can dramatically affect future premiums. With a large volunteer workforce, accidents may occur and drive up per-person costs substantially.⁴

Volunteer Protection Act

The Volunteer Protection Act of 1997 was created, in the words of the law, to "provide certain protections to volunteers, nonprofit organizations and governmental entities in lawsuits based on the activities of volunteers." The timing of the bill coincided with former President Clinton's "Summit for America's Future," a call for all Americans to get involved in community service, and was aimed at removing potential volunteers' fear of liability.

The Act provides liability protection for volunteers under the following conditions:

- ✓ The volunteer was acting within the scope of the volunteer's responsibilities in the nonprofit organization or governmental entity at the time of the act or omission.
- ✓ If appropriate or required, the volunteer was properly licensed, certified or authorized by the appropriate authorities for the activities or practice in the state in which the harm occurred, where the activities were or practice was undertaken within the scope of the volunteer's responsibilities in the nonprofit organization or governmental entity.
- ✓ The harm was not caused by willful or criminal misconduct, gross negligence, reckless misconduct, or a conscious, flagrant indifference to the rights or safety of the individual harmed by the volunteer.
- ✓ The Act does not affect the "liability of any nonprofit or governmental entity with respect to harm caused to any person," nor does it affect a nonprofit's taking civil action against any volunteer or the nonprofit. For more information, see US Public Law No. 105-19.

Questions to Ask about Insurance

- ✓ What kind of liability insurance does your organization carry? Under what conditions is it valid? What situations does it cover?
- ✓ What health and accident insurance does the organization carry? Is it primary or supplementary insurance?
- ✓ What insurance are volunteers expected to have?
- ✓ What insurance is in effect for rental vehicles if rented by professionals or volunteers?
- ✓ Do certain activities (food sales, animal events) require notification or special event insurance?

4. This section reprinted with permission from "Insuring Volunteers," by the Nonprofit Risk Management Center, Washington, D.C., 1999.

II. Supervision and Retention of Volunteers

There are two kinds of supervisors, and it's important to distinguish between them. Some are a "boss." Others are a "leader." The boss drives people, uses authority, dominates everyone and lets no one forget who is in charge. The leader uses very little authority, leads people by example and works with staff to earn their good will. The only kind of supervision that really works in the long run is the leadership kind.

But a good supervisor is not born that way. Neither is an artist, writer or technician of any kind. A good supervisor gets that way by studying and practicing — the more, the better. Just because a person has a good business mind does not mean he or she is a good supervisor.

Below are seven general principles for supervisors to know and use to elicit excellence and support from staff and volunteers:

- ✓ Staff and volunteers must always clearly understand what is expected of them.
- ✓ Staff and volunteers must have guidance in their work (information, techniques enabling better work, coaching and personality improvement suggestions).
- ✓ Good work always should be recognized.
- ✓ Poor work deserves constructive criticism.
- ✓ Staff and volunteers should be given opportunities to show that they can accept greater responsibility.
- ✓ Staff and volunteers should be encouraged to improve.
- ✓ People should work in a safe and healthful environment.

A. Motivation

Volunteer programs are fueled by the motivation of the volunteers and the paid staff at the organization. A motivated volunteer is one who wants to do the job that needs to be done in the spirit of the organization and within its guidelines.

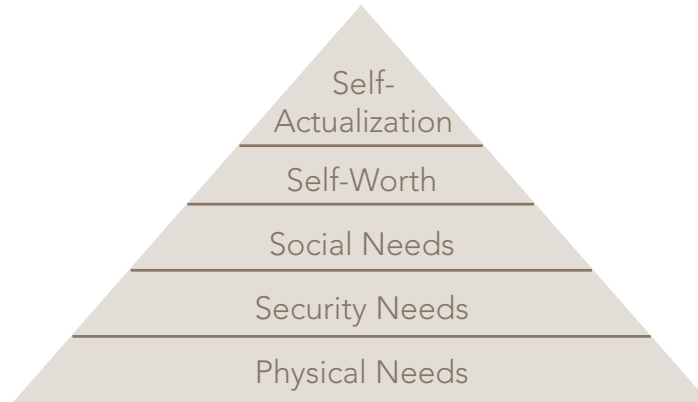
When we talk about motivating volunteers, we are talking about creating a volunteer experience that allows volunteers to meet their motivational needs in ways that are satisfying and productive for the organization. You remove barriers to motivation by designing satisfying work experiences and creating systems that allow the volunteer to meet a need. You make sure, in other words, that volunteers receive their motivational paycheck for the valuable contribution they make to the work of your organization. This is the essence of volunteer retention. (Retention will be discussed in a later section.)

Because each volunteer has a different combination of needs, each will do best in different working conditions. Gaining job experience may motivate some volunteers, whereas

MOTIVATION

Anything that promotes the need or desire to act.

MASLOW'S HIERARCHY OF NEEDS



others may be motivated by the desire to meet new people. Still others may have a burning passion to do something to contribute to a particular cause.

Psychologist Abraham Maslow grouped the various motivating drives each of us has into five categories:

- ✓ **Physical Needs:** Income, health, shelter, sex, food and sleep.
- ✓ **Security Needs:** Safety, continuing employment, healthy environment, and freedom from fear, anxiety and the threat of punishment.
- ✓ **Social Needs:** Love, sense of belonging, atmosphere of acceptance, prestige, recreation and entertainment.
- ✓ **Self-Worth:** Ego satisfaction, a feeling of value and importance to others, the desire to achieve and be recognized for it.
- ✓ **Self-Actualization:** Personal growth, higher education, spiritual development, the drive to realize and utilize one's potential capabilities, the desire to contribute to the betterment of humankind.

It is important to realize that the real motivators in most of us are the "higher level" needs: social needs, self-worth, and self-actualization. But we often forget this. In trying to motivate others, we tend to exaggerate the importance of economic rewards and food and entertainment, or even resort to intimidation and arm-twisting. On the other hand, we tend to underemphasize the importance of people's social and self-worth needs — to be accepted by others, to accomplish something meaningful and be recognized for it, to share ideas and be respected for them and to contribute to community betterment.

We must acknowledge the obvious, that people become involved in different issues, activities and groups ONLY to the extent that their personal needs and interests are appealed to and met. In short, volunteers must perceive a reason for becoming involved. They, not you, must perceive that reason. In our zeal, we often get carried away with what we think

should be done and fail to give adequate attention to the concerns and interests of others. We tell ourselves, “But they SHOULD be interested. After all, it affects the whole community,” or “They OUGHT to support this, it’s for their own good.” We label people as apathetic if they don’t share our interests.

A very effective way to create a motivational environment for volunteers is through example. If you do not appear to be motivated and enthusiastic about your organization, you cannot expect those who work with you to be enthusiastic. Motivation is not something that can be imposed on someone; it is a continuous process and contagious. You can “catch” motivation from someone simply by being exposed to his or her motivation.

Below is a copy of the Bill of Rights for Volunteers.

A Bill of Rights for Volunteers⁵

Every volunteer has:

1. The right to be treated as a co-worker, not just free help.
2. The right to a suitable assignment with consideration for personal preference, temperament, life experience, education and employment background.
3. The right to know as much about the organization as possible.
4. The right to training for the job, thoughtfully planned and effectively presented.
5. The right to continuing follow-up to initial training.
6. The right to sound guidance and direction by someone who is experienced, well-informed, patient and thoughtful and who has the time to invest in giving guidance.
7. The right to a place to work — an orderly, designated place conducive to work and the job to be done.
8. The right to promotion and a variety of experiences — through advancement to assignments or more responsibilities, through transfer from one activity to another or through special assignments.
9. The right to be heard, to be a part of planning, to feel free to make suggestions, to have respect shown for an honest opinion.
10. The right to recognition in the form of promotion and awards, through day-by-day expressions of appreciation, and by being treated as a bona fide co-worker.

Tips on Building a Motivational Climate for Volunteers⁶

- ✓ Be motivated yourself. Sincerity succeeds over technique every time.
- ✓ Be clear on what you want people to do. Use written job descriptions whenever possible so that you are telling the same thing to each potential volunteer.

5. Sloss, R. L. , American Red Cross.

6. Ellis, Susan, *The Volunteer Recruitment Book*, Philadelphia, PA, ENERGIZE, 1994.

- ✓ The more specific you can be the better. If you ask, “Who wants to volunteer?” how can someone decide on the basis of no information? On the other hand, if you ask, “Who wants to prepare for the legislative hearing next month?” you allow people to self-screen their interest.
- ✓ Use titles for volunteer assignments. The word “volunteer” is a pay category, not a job function! Would you apply for a job called “employee?”
- ✓ Do not speak with “forked tongue.” Do not recruit people into assignments by minimizing the work to be done. If you need someone who is available several hours a week or for a full year, say so. It may take longer to find someone, but once you do they will be the right person.
- ✓ Share information about deadlines. When does work have to be finished? What are the internal deadlines prior to the final one?
- ✓ Describe the training and supervision entailed in the volunteer position. Many people are cautious of being thrown in to sink or swim. If they believe they will have help while they learn the ropes, they may be more likely to give something a try. Also, it is reassuring to know that you do not expect them to start the job fully informed or trained.
- ✓ Identify, and express the benefits to the volunteer of accomplishing the task. Every job has pay-offs and it is legitimate to discuss these openly. Volunteering does not have to be totally altruistic or martyring. In fact, the best volunteering is when the giver receives as much benefit as the recipient does.
- ✓ Explain to the people you approach what skills or personality traits make them good candidates for the position.
- ✓ Paint an upbeat picture of the work. Volunteering is a *leisure* activity. You are not competing with salaried employment when you recruit volunteers; your competition is jogging and time with the kids! So the volunteer work should be fun at some level (and remember that everyone defines fun differently).
- ✓ The way to recruit volunteers is to *ask people!*

CONFLICT OF INTEREST

Refers to a situation when someone has competing professional or personal obligations, or personal or financial interests that would make it difficult to fulfill his or her duties fairly.

B. Managing Conflict

From time to time, every organization experiences conflict from differences that arise between individuals within the organization and between group members and interests outside the group. The ability to manage and ultimately resolve conflict is essential to the development of effective relationships with staff and volunteers.

Conflicts often occur because people care or because something that is important to them is threatened — their ideas, their values, their goals, their success, their relationships. Most conflicts have one or more of the following causes:

- ✓ **Misunderstanding.** Conflicting parties may simply misunderstand each other or the situation. They may not communicate clearly. They may not listen carefully. They may not have all the facts or the right facts about the issue. Most conflict is based in miscommunication.
- ✓ **Disagreement about the nature of the issue and its solution.** The world is seen differently by every person, and while that is an exciting aspect of the human condition, conflicts over these different views are inevitable.

- ✓ **Lack of clarity within the organizational situation itself.** Conflict is likely when authority and responsibilities within the organization are not clear, when roles are poorly defined, when organizational goals are uncertain, or when group procedures are unclear or unreasonable.
- ✓ **Personal needs are threatened.** All of us have certain needs and interests. Everyone enters into situations to meet some personal needs or wants. When those needs or wants are threatened or perceived to be threatened, members lash out at what they see as the source — officers, supervisors, staff or the organization.

Your effectiveness in dealing with conflict is largely dependent on how you choose to react to it. You have three choices:

- ✓ Let it pass and forget it, ideally without resentment.
- ✓ Work to improve the relationship, which may require considerable effort and emotional energy.
- ✓ Attack, depreciate or terminate the relationship and be willing to live with the consequences.

We can whine, undermine, shine or recline. It is our choice.

There are many ways to manage conflict — and that is different than resolving conflict. The goal of conflict resolution is not to avoid differences but to remove unnecessary obstacles to productive discussion. Conflict resolution aims to provide an open framework for improving destructive processes and relationships. To manage conflict is to hold it in control, to keep it from getting out of hand but not necessarily get rid of it. All of us as individuals have ways to manage the conflicts in our lives.

The Six Ways to Manage Conflict:

- 1. Avoid involvement in the conflict.** There are times when we simply don't want to get involved. We may feel the issue is not worth it or we don't have the energy to involve ourselves in it. We may use this method to keep ourselves out of the conflict and leave it to others to handle. The risk is that the decisions made may not be to our liking or the conflict may mushroom into a larger issue, drawing us in whether we like it or not.
- 2. Give someone responsibility to solve the conflict.** When time is short, responsibility to make a decision may be given to a group's officer or committee leader or another person in charge. This takes the burden off us as group members or off the group as a whole. It is an effective strategy when time is short and the group has a great deal of trust in those who are charged with making the decisions. The risks of this approach are obvious. In the long run, this method can create highly frustrated and dependent group members.
- 3. Confrontation.** There are times when direct confrontation is necessary to bring your needs, interests or concerns to the attention of another. The other person or group may be unaware of or insensitive to your needs or the impact of their behavior, or they may

be avoiding or denying the conflict. In either case, you may need to be assertive and speak up for yourself, to “rattle their cage,” before conflict management can begin. We often avoid such confrontation for fear of what might happen.

4. **Compromise.** Compromising means all parties discuss the issue and then accept the minimum they can all live with in order to stop the conflict. The goal is to stop the conflict quickly rather than working out the basic conflict issues. The risk is that compromise stops this conflict situation but leaves the door open for similar or even larger manifestations of the conflict later.
5. **Coercion.** Often in conflict situations we find ourselves trying to control others, to impose our will or our way on them. We have concluded that the other party is either ignorant, hard-headed or a troublemaker. We do not have the time or patience to practice the prescribed skills and “besides, it would not do any good anyway.” We have allowed the relationship to deteriorate. We sometimes use power politics or majority rule in our attempt to coerce others. But no one likes to be pushed around or taken advantage of.
6. **Collaboration.** This process ultimately is the most effective in managing group conflict, but it can be time-consuming. It also requires that the parties involved be willing to work together toward a resolution. The benefit of collaboration is that a good and long-lasting solution is found which addresses the root causes of the disagreement.

Listening is Key

In order to effectively manage conflict, we first have to listen. This means:

- ✓ Stop talking.
- ✓ Give the person on the other side of the conflict your total attention. You are not listening if you are thinking about what you are going to say next. Clearly show through your actions that you wish to listen. Giving eye contact or nodding your head will show your interest in listening.
- ✓ Invite the person on the other side of the conflict to share thoughts, feelings and frustrations about the issue at hand. Use phrases such as “Tell me about it,” “Go on,” “Good point,” or “Please explain what you meant by....” Seek to clarify the person’s needs, interests and concerns.
- ✓ Repeat to the other person a summary of what he or she said. “You feel....” “You are concerned with....” Reflect the feelings as well as the words spoken, e.g., “You were quite annoyed over....” Paraphrase, don’t parrot. This clearly shows you are listening, develops rapport and nips miscommunication in the bud.
- ✓ Show genuine interest. Not until the other person feels listened to, understood and respected will he or she be open to your views.

Active listening is key to your effectiveness in conflict management. Conflict is not, however, resolved through listening alone. You must also clearly convey your opinion, needs, concerns and feelings — ideally to the other person’s understanding and respect. Only then can collaborative problem solving begin.

Lose the Fighting Words

Avoid the following phrases that can increase the possibility of conflict:

- ✓ **Ordering:** "You have to..."
"You will..."
- ✓ **Threatening:** "If you don't..."
"You'd better or else."
- ✓ **Preaching:** "You ought to..."
"It's only right that you should..."
- ✓ **Interfering:** "Here's what you should do..."
"It'd be best if you..."
- ✓ **Accusing:** "You started this mess..."
"You won't listen..."
- ✓ **Categorizing:** "You always..."
"You never..."
- ✓ **Diagnosing:** "You're just trying to get attention."
"What you need is..."⁷

If we can manage conflict effectively, we can keep it from getting out of hand. By deciding to do nothing, letting someone else solve the problem, using active listening or compromising, we can manage conflict. None of these approaches, however, will insure resolution of the conflict.

Below are some steps you can use to develop skills in conflict resolution.

Step 1: Identify the Conflict. Conflicts identified early are easier to resolve because they have not escalated to a high level of emotional intensity or complexity. Some cues to pay attention to are: silence, body language, change in social patterns, style differences, recurring problems and cross-program tensions.

Step 2: Decide Whether to Intervene. Consider the following questions: What are the likely consequences of not resolving this issue now? Are you the most appropriate person to help resolve this conflict? Can you be objective about the people and issues? Can you make the time to deal with the resolution process?

Step 3: Identify Parties Involved, Issues and Emotions. Consider the following questions. Who has a stake in the conflict? Do certain groups have the same interests and positions? How does each person see the issues in the conflict? What does each party seek as a solution to the conflict? How emotional are people regarding the conflict?

7. Cloke, Kenneth and Goldsmith, Joan, *Resolving Conflicts at Work, A Complete Guide for Everyone on the Job*, Hoboken, NJ, Jossey-Bass Publishers, 2001.

Step 4: Analyze the Conflict. Your analytic abilities, managerial judgment and creative thinking are your best tools for analyzing a conflict. Consider the following questions: Can an informal process handle this conflict? Who are all the people with stakes in this conflict? Are these individuals capable of making rational, informed decisions? What are the power relationships among the individuals? What gender or cultural differences must be considered? How does each person describe the conflict? What is each party's position? What does each party say — or what can be inferred — about their key needs and concerns? Is the conflict interpersonal, induced by the system or both? Are there known limitations to potential resolutions that you must impose on behalf of the organization?

Step 5: Design the Process. Answering these questions will help you plan the best way to bring the parties together to address the conflict: What are the goals of the process? How much time will the process take? How will power imbalances be handled? How will you handle people's emotions regarding the conflict? In what setting will the meetings occur? How will you protect people's need for privacy and confidentiality?

Step 6: Educate Parties and Get Agreement to Participate. Explain everything that will happen with the conflict resolution process and ask each person to agree to participate.

Step 7: Conduct the Process. Hold a meeting to help the parties involved find a creative solution to their differences. The basic steps are:

- ✓ Set up the meeting environment.
- ✓ Open the meeting.
- ✓ Ask the parties involved to describe their experiences without interruptions.
- ✓ Invite questions.
- ✓ List and sort issues.
- ✓ Decide which issues to discuss first.
- ✓ Discuss issues.
- ✓ Generate ideas for solutions.
- ✓ Review the issues and possible solutions.
- ✓ Agree to a resolution.
- ✓ Formalize the agreement.

Step 8: Celebrate and Check In. When people work through a conflict, it's important to celebrate. View the celebration as a signal of the parties' willingness to resolve future conflicts, preferably on their own. Set a future time — a week, a month or a few months away — when you will check in with those involved in conflict to see how their agreement is holding up. This gives everyone an opportunity to fine-tune the agreement to stave off future problems and ensure that everyone remains satisfied.⁸

8. Peters-Angelica, Marion, *Keeping the Peace: Resolving Conflict in the Boardroom*, St. Paul, MN, Amherst Wilder Foundation, 2000.

C. Retention

Retaining your volunteers is the key to success. Retaining volunteers is an indication of how effective you are in managing your volunteer program. If volunteer turnover is high, this could send a red flag to potential volunteers that your environment may not be “volunteer friendly.” There is no point in being good at recruitment if you cannot keep volunteers coming back. Recruitment is a solution to the problem of not having enough volunteers; retention is a way to avoid the problem altogether.

There are two critical points in the volunteer’s relationship with the organization:

- ✓ **The First Six Months:** Studies of volunteer retention have determined the first six months of a volunteer’s experience are critical for retention. It is during this time that volunteers may grow dissatisfied by work overload or inappropriate job matches.

The greatest loss of volunteers occurs during this period, as volunteers resign or simply drift away and disappear. The loss probably occurs because new volunteers have approached the organization with a set of expectations regarding what they will encounter and what they will accomplish. Then during their initial contact with the organization and its work, they come face-to-face with the reality of the situation. If there is a significant gap between the high expectations and the actual situation, the volunteer is more likely to decide to leave.

You should pay close attention to volunteers during this early period and smooth the transition through the normal ups and downs of this acclimation period.

- ✓ **Anniversaries:** Volunteers also require attention at anniversaries such as annual evaluation dates, the end of a large project or the completion of an agreed term of participation.

At these critical points, volunteers are likely to re-evaluate their services to the organization, reconsidering their commitment to and interest in the work. You may be able to suggest new jobs within the organization that will help them achieve new objectives.

Do not assume a volunteer will always want to do the same job. Volunteers change over time, due to changes in their own lives and to exposure to other types of volunteer work. Periodically review with them what they are doing.

Since volunteers come to your organization because they want to help, it is essential to do everything you can to give them work as soon as possible. Under-utilization creates serious retention problems because motivated volunteers who want to be of assistance will feel useless if they are not actively involved. They will also lose any sense of relationship with the organization over long periods of inactivity.

When in doubt, ask volunteers what they want to do. Work together to identify the right job and then ask them if they feel successful at it. This issue of a good fit must be explored continually because motivational needs of volunteers change, as do other needs and interests.

OBJECTIVES

Minimum measures needed to meet certain goals.

General Guidelines for Any Volunteer

- ✓ **DO** ask for help when you're in doubt.
- ✓ **DO** be kind, courteous and helpful.
- ✓ **DO** try to be flexible.
- ✓ **DO** dress comfortably, neatly and appropriately.
- ✓ **DO** come on time and leave on time.
- ✓ **DO** call if you anticipate being late or absent.
- ✓ **DO** know your supervisor and his or her role.
- ✓ **DO** familiarize yourself with the organization, population and office.
- ✓ **DO** trust your instincts.
- ✓ **DO NOT** participate in or tolerate verbal or non-verbal exchanges of a sexual nature (or that might be perceived as sexual) with a client or coworker.
- ✓ **DO NOT** give a client a ride in a personal vehicle unless you are authorized to do so.
- ✓ **DO NOT** give your phone number or address to clients.
- ✓ **DO NOT** exchange money with a client.

The Top 25 Methods for Retaining Volunteers⁹

1. Convince the entire paid staff to follow rules 2 through 25 because one person can't do it alone. Volunteer programs work only with a commitment that starts at the very top of the organization and continues all the way down through each successive level of management and staff.
2. Balance the needs of the agency with the needs of your volunteers. Remember that it has to be a mutually satisfying relationship for both parties.
3. Consider your volunteers as unpaid staff and include them whenever possible in office parties, lottery pools and other similar activities.
4. Every once in a while, work alongside your volunteers. It promotes a sense of teamwork and reinforces the idea that you wouldn't ask them to do anything you wouldn't do yourself.
5. Set limitations with the paid staff as to which tasks volunteers will be asked to perform. If the operations manager suggests using volunteers to clean up at the annual Farm Animal and Petting Zoo Fund-raiser, just say no. Your volunteers are too valuable to be given the tasks that nobody else wants to do.

9. John Lipp, coordinator of volunteer services for the city of Tempe, Arizona, presented this list as part of a panel discussion, "Volunteers! Now That You've Got Them, How Do You Get Them To Stay?"

6. Make the volunteer experience at your agency fun. No matter what work the volunteers are doing, they should have a good time doing it.
7. Smile. No matter how much you want to grab the computer terminal and throw it across the room, don't let it show. Never let them see you suffering from stress.
8. Be flexible as an individual. Be willing to listen to volunteer concerns and suggestions.
9. Be flexible as an agency. Do not have policies so strict that volunteers feel uncomfortable in your environment.
10. Always emphasize your agency's mission statement. People no longer volunteer for agencies, they volunteer for causes.
11. Resist the urge to "play favorites" among volunteers. In other words, be consistent with your policies.
12. Practice the fine art of informal evaluations. It is amazing how much feedback you can get by just chatting with your volunteers.
13. Create a volunteer advisory committee. (Note: The key word is "advisory.") It will help empower volunteers, giving them a stronger connection to your agency and its mission and a reason to stay involved.
14. Use the media to promote your active volunteers. The media love stories about volunteers. Plus, no matter what they say, people just love to see their names in print.
15. Do not call on the same volunteers over and over again. It's too easy to become dependent on the "yes" people and burn them out. Plus, you miss out on developing a whole new pool of talent.
16. Acknowledge that the agency is not your volunteer's number-one priority in life. Guilt may have worked for your parents, but it doesn't work with volunteers.
17. Promote volunteers to new positions that require new skills, additional training and added commitment. Just because Dan is great at stuffing envelopes doesn't mean he is going to be happy doing it for the next ten years.
18. Once a year, ask the volunteers to give an anonymous evaluation of your agency, paid staff and the programs it offers (including the volunteer program).
19. For absolutely no reason at all, send your volunteer a note just to say "Hi."
20. Take the time to train your volunteers so they know what's necessary to do the job.
21. Vary your recognition program. The same old banquet with the same rewards every year gets boring. When volunteers stop attending because they've already re-papered their house in certificates of appreciation, you know it's time to move on to something new.

22. Don't be afraid to say "thank you" too much. Volunteers don't quit because they feel over-appreciated. Overworked, yes! Over-appreciated, no!
23. If your agency does not already have one, hire a professional volunteer program administrator.
24. Place volunteers in the right spot from the beginning. If you place a volunteer in a position that maximizes his or her potential for success, logic says he or she will succeed. Successful people tend to be happy people, and happy people tend to stay.
25. Each of us has his or her own unique motivators. If you really want volunteers to stay, learn what motivates them and then put that information into practice.

D. Recognition

Volunteers should be recognized for competent performance. Besides promotions to a different position in the volunteer program, recognition can take the form of certificates of accomplishment, public praise, or simply giving positive feedback on their level of competence. Base the type of recognition you choose on a careful analysis of what motivates each volunteer.

It's also important to give volunteers a sense of appreciation and reward them for their contributions. You can convey this through a number of processes, including both formal and informal recognition systems. Both methods convey a sense of appreciation and reward your volunteers.

Formal recognition is helpful in satisfying volunteers who have a need for community approval. Many organizations hold an annual ceremony in which individual volunteers are singled out for their achievements. Formal recognition comes in the form of:

- ✓ Awards
- ✓ Certificates or plaques
- ✓ Dinners or receptions
- ✓ Volunteer "honor rolls"

In determining whether to hold a formal ceremony, consider the following:

- ✓ Is this being done to honor the volunteers or so the staff can feel they have shown their appreciation?
- ✓ Is it real and heartfelt, not stale or mechanical?
- ✓ Does it fit? Would the volunteers feel better if you spent the money on the needs of the clients rather than on a dinner or luncheon?
- ✓ Can you make it a sense of celebration and builder of team identity?

But formal ceremonies don't meet the needs of volunteers whose primary motivation is helping clients. These volunteers feel motivated and honored by recognition of their clients' achievements and the contributions the volunteers make toward those achievements.

Informal recognition comes about during day-to-day interchanges between volunteers and staff, through staff expressions of sincere appreciation and thanks for the volunteers' work. This type of recognition is more powerful in part because it is much more frequent — a once-a-year dinner does not carry the same impact as 365 days of good working relationships. Day-to-day recognition includes the following:

- ✓ Saying "thank-you."
- ✓ Involving the volunteers in decisions that affect them.
- ✓ Asking about a volunteer's family and showing an interest in their life outside your organization.
- ✓ Making sure volunteers receive equal treatment compared to salaried staff.

The intention of day-to-day recognition is to convey a constant sense of appreciation and instill a feeling of belonging, often better conveyed by thousands of small interactions on a daily basis than an annual event.

Recognition Methods

- ✓ Say "thank you."
- ✓ Write a letter of recommendation.
- ✓ Share accomplishments during evaluation sessions.
- ✓ Choose a "volunteer of the week" or "volunteer of the month."
- ✓ Remember birthdays and anniversaries.
- ✓ Create certificates.
- ✓ Give public recognition.
- ✓ Solicit local media coverage of the volunteers' work and accomplishments.
- ✓ Be enthusiastic.
- ✓ Give them the tools they need to do their work during orientation and training.
- ✓ Provide a good working environment.
- ✓ Maintain open communication.
- ✓ Ask them to talk to groups about their volunteer experience.
- ✓ Use a bulletin board to post pictures of volunteers.
- ✓ Compliment volunteers in front of others.
- ✓ Invite them to a potluck meal.
- ✓ Ask volunteers to train other volunteers in areas in which they are skilled.
- ✓ Ask volunteers to write a column or article for the local newspaper.
- ✓ Plan occasional surprise treats to say thank you.
- ✓ Plan "no-pressure" social events.
- ✓ Ask volunteers to represent your agency at meetings.
- ✓ Recognize burnout and give pep talks or breaks if needed.
- ✓ Keep a chart showing how many hours volunteers have contributed.
- ✓ Work alongside a volunteer.
- ✓ Recognize volunteers' accomplishments.
- ✓ Provide safe physical surroundings.
- ✓ Nominate volunteers for community service awards.

- ✓ Take volunteers to lunch or dinner.
- ✓ Let volunteers know they are missed when they are absent.
- ✓ Consult with volunteers in their areas of expertise.

E. Volunteer Records

Keeping accurate records of volunteer hours and work is a way of keeping track of your program. Provide volunteers with a way of reporting their hours to you: a sign-in sheet, a monthly form for those who do their work away from the office, a phone-in system, or whatever works best for your organization.

A personal record for each volunteer is also important. You can keep a file on each volunteer that lists length of service and changes in assignments. A file folder with an application form and periodic performance evaluations can be an important record for writing references, which volunteers sometimes ask for. This record keeping is an important administrative aspect of the volunteer program manager's job. Some items to include in each volunteer's record include:

- ✓ Volunteer hours
 - Report form or sign-in sheet for each volunteer
 - Monthly composite report of all volunteer hours
- ✓ Volunteer application form
- ✓ Individual file for each volunteer
 - Information form
 - Periodic evaluations
 - Exit interview write-up
 - Final evaluation by the volunteer

Keeping volunteer records is also important to the organization because it helps to substantiate your organization's work. Following are some reasons for using volunteer records:

- ✓ Hours served by volunteers can help document the need for allocation of additional paid positions when it's time to seek additional funds.
- ✓ Volunteer hours offer another means of evaluating the volunteer service, e.g., dependability, consistent performance of service and accountability.
- ✓ Asking a volunteer to be responsible for reporting the number of hours served and expecting them to do so tells the volunteer that their work and position is important to the organization.
- ✓ Statistics provide decision makers with the necessary information to justify the program and evaluate the service. Cost/benefit figures go a long way in influencing decision makers who are preparing to allocate funds.
- ✓ As the volunteer program grows and the organization benefits from increased volunteer services, budgets for administration costs must also be increased. Only with a good reporting and recording system can increased budgets be justified.

Sample Volunteer Application

Name _____

Address _____

Telephone: Home _____ Best time to call _____

Work _____ Best time to call _____

E-mail address _____

Highest educational level: _____ Area of study _____

Special training: _____

Interests or hobbies: _____

Other organizations where you are/were a volunteer: _____

Availability:

Weekday Weeknights Weekends Seasonal By appointment

Would you prefer to work with: Youth Adults Both

If you prefer to work with youth, what age level do you prefer? (Check all that apply)

5 to 8 9 to 12 13 to 15 16 and older

References:

Please list three people not related to you who have knowledge of your qualifications.

1. Name _____ Relationship _____

Address _____

Phone _____

2. Name _____ Relationship _____

Address _____

Phone _____

3. Name _____ Relationship _____

Address _____

Phone _____

Signed _____ Date _____

III. Training Volunteers

Training is a crucial element of any volunteer management program because it equips people to perform their tasks. If your volunteers start with appropriate and adequate training, they'll have a positive frame of mind about your ability to give them what they need to do a good job. This also establishes a foundation for keeping volunteers motivated.

A. Orientation Process

A first step in any training program is orientation. The orientation should give volunteers a feeling of welcome and belonging. It can also be an effective tool for public relations and education about your agency.

The orientation should provide an opportunity for volunteers to meet each other before they begin work. If you build a strong team from the beginning, they will be more likely to ask one another for help later if they should need it.

The orientation should also provide all of the tools volunteers need for the services they will be providing. In addition to tools, the orientation should them a good idea of what to expect and prepare them to handle problems that occur along the way.

Inform your volunteers well in advance of when and where the orientation will take place. Also offer alternate times for people with conflicting schedules. It can never hurt to call the volunteers ahead of time to remind them.

Below is an example of a general outline to use during orientation:

Basic Orientation Outline

- ✓ Explain the program's goals and objectives
- ✓ Introduce the salaried staff. (Staff who will supervise the volunteers should attend.)
- ✓ Introduce the organization and explain its philosophy. Include an organizational chart, information on services and a tour.
- ✓ Explain the volunteer's role, what volunteers will be doing and who benefits.
- ✓ Tell volunteers the name of their immediate supervisor and where he or she is located.
- ✓ Give volunteers a set of guidelines, including rules, record-keeping systems, insurance information, attire requirements and any other similar information.)

- ✓ Detail the relationship of your organization to other organizations.
- ✓ Provide volunteers with a description of clients so they can communicate with them.
- ✓ Define any jargon or specialized language they might hear being used by the salaried staff.

A volunteer handbook will be helpful for getting volunteers acclimated. It should include a list of the staff, an organization chart, funding sources, client profiles, policies and procedures, and other relevant information. This ensures that all volunteers receive the same information about your organization.

Sample Training Content for Volunteers

- ✓ Basic information about your organization and its services
 - Organizational structure and history
 - Clients served
 - Types of services offered
 - Funding sources
 - Organization's mission and its role in the community.
- ✓ Information on the specific job
 - Policies regarding volunteers in your organization
 - Procedures for the specific job
 - Where the job fits into the organization's work
 - What staff expect of volunteers
- ✓ Experience with the job
 - Role plays and simulations as part of the training
 - On-the-job training by experienced volunteers and/or staff
 - Ongoing training as needed
- ✓ Methods of imparting information
 - Lecture
 - Panel discussion
 - Films, slides, tapes
 - Reading assignments

- ✓ Methods of group participation
 - Facilitated discussion
 - Questions and answers
 - Let group set topic and/or agenda
 - Experienced volunteers conduct parts of the training
- ✓ Experiential exercises
 - Role play
 - Simulation
 - Group problem-solving
 - Individual work with materials provided
 - Questionnaires (on attitudes, for example)
 - Written assignments

Sample Policies and Procedures for Volunteers

1. Names of agency clients and donors are to be held in strict confidence by volunteers and salaried staff. Inappropriate use of confidential materials is sufficient grounds for termination.
2. Client records are not to be reviewed by volunteers except with permission of the executive director.
3. Ongoing training meetings are part of the volunteer job. Attendance is required unless the director of volunteers excuses the volunteer.
4. When volunteers are going to be absent from their assignment, they should call the director of volunteers and/or their supervisor at least 24 hours in advance (except in emergencies).
5. The director of volunteers is the liaison between the volunteers and the agency. Volunteers should bring any problems, concerns or suggestions to the director of volunteers and let him or her know if they would like a change in assignment.
6. Volunteers are required to sign in and out when they work in the office. Volunteers who do not report to the office are required to turn in their hours monthly to the director of volunteers.

7. The director of volunteers will formally evaluate volunteer performance with input from other staff every six months. Volunteers will also be asked to evaluate their own performance at that time.
8. Volunteers will be asked for an evaluation of the volunteer program periodically and also upon leaving the program. Comments and suggestions are welcome at other times as well.

B. Ongoing Training

High-quality training is key to the success of any volunteer program and should be ongoing. Training sessions help ensure that all volunteers are receiving the latest information about your organization and its clients. Training can also serve as a motivator.

There are a variety of training mechanisms to choose from including lectures, discussions, audiovisual presentations, role-playing and case studies. People want to learn and it is the trainer's responsibility to provide volunteers with the materials and methods by which to do so.

Training should provide a mixture of informational and experiential methods. For the informational part, you should decide what subject areas you want to cover and how the topics will be presented, such through a lecture. The informational part should be balanced with an experiential component including exercises or role-playing. Allow ample time for questions, discussion and reaction to the training.

UNIT 3:

Program Evaluation

Purpose:

Evaluating both individual performance and the program as a whole will identify strengths and weaknesses of your volunteers and program. But evaluation is not enough. You have to act on the results of the evaluation, making necessary changes to improve performance and service. This unit explains the importance of evaluating your volunteers and the program and examines different types of evaluation mechanisms. It also identifies which aspects of a program to evaluate.

Learning Objectives:

By the end of this unit, learners will be able to:

- ✓ Describe various types of evaluations.
- ✓ Develop evaluation mechanisms.
- ✓ List the reasons for evaluating volunteers.
- ✓ Explain which aspects of a program to evaluate.

I. Basics of Program Evaluation

Volunteer managers are continually faced with the need to demonstrate the value of their programs. Potential funding sources need evidence of program outcomes to decide on allocation commitments, executive directors need data to support decisions to continue a program, and volunteers want to know that their efforts produce results.

An evaluation examines any or all the aspects of a volunteer program — its process, results or broad impact — to demonstrate its value.

Process

Organizational process is composed of the day-to-day operation of a program and how the program functions. A process evaluation of a volunteer program examines the tasks volunteers perform, the skills and abilities they bring to their jobs, their job performance, their satisfaction with the program, the amount of time they contribute, and their retention rate.

You may find that examining all these elements is impossible because of time and budget constraints. Instead, identify those elements that are most important and explain the rationale for including them in your evaluation.

Results

Evaluation results show the direct consequences or outputs of a program and the products and services that a program provides. Using such information as the number of clients served, the amount of service provided and/or the amount of money raised, it demonstrates direct results of your volunteer program.

Base your evaluation of results on your organization's goals and objectives — that is, its projection of the direct consequences of your volunteer program. You should establish evaluation criteria in clearly written, measurable objectives.

Impact

Impact evaluation measures the broad consequences of a program, such as how the lives of clients have improved, how the health of a community has changed or how the organization has been helped in achieving its mission. Impact evaluation examines the degree to which the overall needs a program was designed to address have in fact been alleviated.

FORMATIVE EVALUATION

A process that monitors the use of resources and the completion of tasks according to schedule.

SUMMATIVE EVALUATION

Assesses the achievement of a program's goals at its completion.

Because impact evaluation looks at the consequences of a volunteer program in the broadest and most inclusive form, it is also the most challenging kind of evaluation to conduct. The total impact and benefit of a program may be difficult to completely describe because of its nature. However, when groups of people benefit from programs such as HIV/AIDS-prevention campaigns, publicly available data that track demographic or economic changes may assist in quantifying a program's outcomes.

Most programs are evaluated both while they are being conducted and after they are concluded. Processes that monitor the use of resources and the completion of tasks according to schedule are known as formative evaluations. Assessing the achievement of a program's goals at its completion is summative evaluation. Carefully designed evaluations include both methods.

Formative evaluation, usually conducted by the volunteer manager, is done throughout the course of program implementation. Its main purpose is to monitor program process by determining if the program is being carried out according to plan. Formative evaluations monitor all aspects of a program's process, particularly the adequacy of resources assigned (both personnel and budgetary), the timing of activities and the incremental achievement of objectives. Formative evaluation answers these questions:

- ✓ Is the project on schedule?
- ✓ Are the resources being expended?
- ✓ Is the implementation of the program consistent with the mission of the organization?

Summative evaluations are conducted to determine the degree to which project goals and objectives were achieved. For this reason, summative evaluations occur at the conclusion of a project or program. Although results and outcomes are their chief focus, they also describe the resources and the process used by a particular program. The principal users of a summative evaluation are funders, board members, clients and administrators. They are interested in knowing whether a program achieved its purpose, was cost-effective and shows promise of continuation.

Role of the Volunteer Manager

Volunteer managers sometimes assume a number of roles in a program evaluation. They may be required to plan and organize the evaluation, implement it or interpret its findings to justify or improve the program. In other situations, volunteer managers are expected to cooperate with external evaluators and then implement their recommendations. In either case, volunteer managers are well served by possessing the knowledge and skills required in program evaluation so that their decision-making and record keeping can be guided by the need to demonstrate program efficiency and effectiveness.

II. Continuous Feedback

Several types of evaluation are important in volunteer program management. Each one addresses a different aspect of the impact volunteers have on an organization.

- ✓ **Periodic evaluation of each volunteer's performance:** You should include regular evaluations in your written policies and let volunteers know when they begin work that you will be meeting with them after six months (or whatever interval you choose) to discuss how they are doing. Evaluation sessions foster constructive criticism and can be used to give volunteers the appreciation they deserve. Volunteers who have done a good job will have written proof in their evaluation form.

Evaluation of the program by the volunteers should also be done regularly. It is an integral part of your evaluation sessions with volunteers and can be addressed in ongoing training meetings.

- ✓ **Evaluation of the volunteers' services by clients:** This should be done as part of a broader evaluation of your organization's range of services. If your organization does this, you can add a few questions about how satisfactory the clients found their interaction with volunteers. Staff members who are in close contact with clients should also ask for feedback on volunteer performance. This feedback can give you insight on ways to improve your program and provide constructive criticism and appreciative words for your volunteers.
- ✓ **Evaluation of the volunteer program by staff:** You should ask staff members for their input into volunteer program evaluation. Ask for feedback at staff meetings, talk individually to staff members or just ask for suggestions and reactions to the program. Keeping in close contact with staff who work with the volunteers will give you continual feedback on how each volunteer work situation is progressing and help you improve the effectiveness of the program for staff.
- ✓ **Evaluation of the monetary contribution:** For any given year, compare the budget outlay for your volunteer program with the number of hours volunteers have served multiplied by fair hourly compensation for their time. The figure can be quite impressive and provides a good argument for spending the money to keep a program going or even expand it.

III. Developing an Evaluation Mechanism

Volunteers should know before they start working which criteria will be included in their evaluations. Include a copy of the evaluation form in the volunteer handbook so they know what is expected of them.

To create the volunteer evaluation form, decide which qualities and behaviors are important for each volunteer job and for the organization as a whole. Some important areas are:

- ✓ Reliability
- ✓ Promptness
- ✓ Good relations with staff and clients
- ✓ Good relations with other volunteers
- ✓ Willingness to follow policies and procedures
- ✓ Attendance at required meetings
- ✓ Sensitivity and creativity
- ✓ Performance of the specific duties of the job

Since these qualities and behaviors are important in paid as well as volunteer work, evaluating them is especially important for those volunteers who are using their volunteer jobs to build experience and references for the job market. Having the evaluations on file makes writing references easy for you no matter how long it's been since the volunteer worked with you.

Having volunteers evaluate themselves is also a good idea because it encourages them to give themselves feedback before they hear it from you. Ask your volunteers to fill in the same evaluation form you use, or give them a different kind of form that will spark a discussion of their experience and needs. Schedule meetings to discuss the feedback forms among the volunteers and take action.

Evaluation must then be followed by action. Put into practice the changes suggested by your analysis of the results. This will prevent your methods and programs from becoming obsolete and ensure that the program keeps growing. It will also inspire better performance in your volunteers, which leads to better service for your clients and more positive staff involvement with volunteers.

Sample Volunteer Performance Evaluation

Name _____

Date _____

Performance Factors	<i>Exceeds Requirements</i>	<i>Satisfactory</i>	<i>Needs Improvement</i>	Comments
Dependability Availability Judgment Attendance at meetings Following of procedure Record keeping				
Interpersonal Relations Relations with clients Relations with staff Relations with other volunteers Teamwork/cooperation				
Personal Qualities Neatness Insight into self and others Sensitivity Initiative and creativity				
Comments				_____ _____ _____ _____
_____ Volunteer				_____ Volunteer Coordinator

Ending a Volunteer Experience

If a volunteer's work is not meeting requirements, you and the volunteer can come to one of several conclusions: the requirements of the job need to be changed, the volunteer simply needs to try harder, the volunteer needs a different assignment, or the volunteer should terminate his or her involvement with the organization. If a volunteer is not right for the job and does not seem appropriate for another assignment, it's best to help him or her see this objectively and to suggest other places or types of volunteer work that might be more suitable. When a volunteer job does not work out after trying various solutions, a volunteer's departure should be a mutual decision wherever possible.

All volunteers should be asked to fill out an exit evaluation, regardless of the reason for the volunteer's departure.

Sample Volunteer Exit Evaluation

1. What was your volunteer job at ABC Organization? _____

How long did you volunteer? _____

Why did you leave? _____

2. Did you feel your volunteer work was a rewarding experience? _____

Can you suggest anything that would have made the experience more meaningful? _____

3. Was the orientation and supervision by staff sufficient? _____

Any suggestions for improvement in these areas? _____

4. What is your overall impression of ABC Organization? _____

Would you consider becoming involved with ABC Organization again? _____

Would you like to remain on the mailing list? _____

5. Additional comments or suggestions: _____

Name _____ Date _____

Address _____

Phone _____

Thanks for your help!

Post-training Assessment

Answers to the Pre-training Assessment.

1. **True** **False** The organization's needs should be assessed before volunteers are recruited.
2. **True** **False** Job descriptions help reduce conflicts that may arise between staff and volunteers.
3. **True** **False** Volunteer records should be maintained only for the duration of the volunteer task.
4. **True** **False** Volunteer recruitment should focus only on fulfilling the needs of the organization.
5. **True** **False** Recruitment messages should have three parts: statement of need, job description and benefits.
6. **True** **False** The Volunteer Protection Act provides certain protections to volunteers, nonprofit organizations and governmental entities in lawsuits based on the activities of volunteers.
7. **True** **False** Motivating volunteers involves creating a volunteer experience that allows an individual to meet their motivational needs in ways that are productive for the organization and satisfying for the individual.
8. **True** **False** The main difference between managing and resolving conflict is that managing conflict involves getting control of the situation without getting rid of the situation.
9. **True** **False** Retention of volunteers should focus on the first six months of a volunteer assignment and anniversaries of the volunteers.
10. **True** **False** Recognition of volunteers may involve formal or informal methods.
11. **True** **False** Evaluations help identify strengths and weaknesses of the volunteer program and the volunteers.
12. **True** **False** An evaluation can examine one of three aspects of a program — its process, its results or its broad impact — or any combination of these elements.
13. **True** **False** Formative evaluations are conducted to determine the degree to which project goals and objectives have been achieved.
14. **True** **False** Volunteers should know what they will be evaluated on before they start working.

APPENDIX A

Glossary

Conflict of Interest: When someone has competing professional or personal obligations, or personal or financial interests that would make it difficult to fulfill his duties fairly.

Evaluate: To determine the value of something.

Formative Evaluation: A process that monitors the use of resources and the completion of tasks according to schedule.

Goals: Measure used to specify the tasks one plans to accomplish by the end of the project.

Motivation: Anything that promotes the need or desire to act.

Objectives: Minimum measures needed to meet certain goals.

Risk Management: A discipline for dealing with the possibility that some future event will cause harm.

Summative Evaluation: Assesses the achievement of a program's goals at its completion.

Volunteer: Anyone who without compensation or expectation of compensation, beyond reimbursement of expenses incurred in the course of volunteer duties, performs a task at the discretion of and on behalf of the organization.

APPENDIX B

Frequently Asked Questions

1. What is a volunteer program?

A program that mobilizes volunteer resources to fulfill the mission, vision and goals of an organization or group in order to meet community needs.

2. What are some ways of recruiting people with HIV/AIDS to volunteer with our organization?

Recruiting people with HIV/AIDS often entails making it well-known that your organization will not discriminate against people with HIV/AIDS. Invite their participation in your work by posting statements such as “Those covered under the Americans with Disabilities Act are encouraged to apply” in all your published literature and volunteer solicitations.

3. How do you calculate the value of volunteer time?

In 2001, the dollar value of volunteer time is \$16.05 per hour. This was calculated by taking the average hourly earnings of all production and non-supervisory workers on private non-farm payrolls (as released by the Bureau of Labor Statistics) and increasing the figure by 12 percent to account for fringe benefits.

4. Are there any professional development associations for volunteer managers?

Yes. One of the more prominent ones is the Association for Volunteer Administration. Their website is www.avaintl.org.

5. How long should you keep volunteer records?

Volunteer records should be kept for the same amount of time as employee records. This practice is recommended in case your organization is audited. Having volunteer records available could answer questions raised during an audit.

6. When is the best time to recruit volunteers?

This answer depends on your organization’s program. You might need to conduct year-round recruiting or you might need volunteers only during certain months. No matter whenever you need them, you should begin planning your recruitment process in advance to ensure the program starts on time.

7. Why should we conduct volunteer evaluations?

There are two main reasons for conducting volunteer evaluations: to help volunteers work closer to their potential and to help your organization improve volunteer involvement in its work.

APPENDIX C

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Internet Resources

www.avaintl.org: Association for volunteer administrators.

www.energizeinc.com: Resource for leaders of volunteers.

www.volunteernow.com: Offers software and other products to manage volunteer programs.

www.serviceleader.org: Offers volunteer management online resources.

www.volunteertoday.com: An e-newsletter for those who manage the work of volunteers.

www.project.org: Creates partnerships between volunteers and organizations that need them.



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