

Volunteer Engagement

Effective Policies and Procedures

Effective volunteer management policies and procedures are essential for a variety of reasons. Policies are general guidelines that personnel can reference in order to make decisions and get guidance on how to act in certain situations, eg, a policy about dress codes. Procedures are specific step-by-step directions regarding completion of a specific task, eg, use of office equipment such as copiers. Policies help ensure that volunteers are supervised and that they act according to a legal, ethical and organizationally-preferred manner in the workplace. Written, standardized, policies and procedures are necessary for several reasons:

- Written, standardized policies and procedures are necessary to insure the program's sustainability throughout changes in administration, staff, and volunteers.
- Clearly communicated and routinely implemented policies and procedures are a necessary step in the risk management process. As organizations implement volunteer positions an important step is to identify potential areas of risk and the steps and corresponding policies that minimize the identified risk.
- They lend important and perhaps ensure compliance thus preventing problems before they occur.
- Effective and clearly defined policies and procedures are necessary for effective volunteer recruitment and retention. Individuals are drawn to and more likely to continue service with organizations that are well run and are thus perceived as being more productive and effective in meeting community needs.

Downloadable Resources:

The Start Smart Toolkit is a publication from Volunteering Australia. The publication provides tips and templates relevant to nonprofit's within the United States that are seeking to develop effective policies. The only unrelated areas are the few references to Australia's labor laws. ([insert link to document](#))

A google search will identify many sample volunteer handbooks and policies. Using key words relevant to your organization such as "mentors" or "food banks" will provide samples that may provide more specific examples. One fairly generic example published by the Chicago Foundation for Women provides topics and sample language ([insert link to document](#))

The "Volunteer for Children Act" brochure published by the Wisconsin Department of Justice provides the legal requirements and process for organizations serving children, elderly or the disabled use of the national fingerprint based criminal history checks seeking to screen out volunteers and employees with relevant criminal records. ([insert link to document](#))

Online Resources:

Tobi's Nonprofit Management Blog provides a variety of relevant tools and tips. The May 17, 2012 blog topic— Volunteer Handbooks: A Simple Guide" provides a tips for writing effective policies and handbooks as well as a link to a sample table of contents.

<http://tobijohnson.typepad.com/tobisblog/2012/05/volunteer-handbooks-a-simple-guide.html>

Privacy Rights Clearing House provides a fact sheet (16d) "Volunteer Background Checks: Giving Back Without Giving Up" addresses concerns, relevant laws and tips for organizations including policy recommendations:

<https://www.privacyrights.org/fs/fs16d-VolunteerScreening.htm#7>

The Society for Human Resource Management provides samples of a variety of employee policies as well as information relevant to volunteer engagement particularly company volunteer programming policies. Access sample language relevant to Volunteer Screening at: http://www.shrm.org/TemplatesTools/Samples/Policies/Pages/CMS_000583.asp

Volunteer Leaders

The implementation of effective policies and procedures often represents a major challenge to nonprofit organizations. Volunteers can assume more leadership assuming a variety of responsibilities that free staff from a those responsibilities in recruitment, orientation, training and even supervision. Volunteer leaders can serve to speed the volunteer on-boarding process, offer a personal success story as a part of the orientation process, plan projects and provide more direct supervision. Volunteer leader programs also serve as a form of “recognition” for those volunteers who are most committed to the organization’s mission.

HandsOnNetwork provides a variety of Volunteer Leader resource materials including a Volunteer Leader Toolkit. The toolkit includes a variety of tips and templates. Topics reflect the steps involved in planning and implementing a volunteer project from a task list and project planning worksheet and timeline to a volunteer incident report form and follow up report form. The toolkit can be accessed at:

<http://www.handsonnetwork.org/volunteers/gethandson/toolkits>

The site also offers an online training program designed to be completed by individuals interested in assuming a Volunteer Leader position within an organization.

Downloadable resources:

HandsOn Networks 2010 guide-- [Volunteers As Leaders](#) provides a rationale and planning process for nonprofits and individuals ([insert link to document](#))

New York Cares [Leadership Ladder](#) New York Cares implemented a pilot program that offers a potential guide to help move volunteers into effective leadership programs. The organization’s Leadership Ladder publication documents the steps and process implemented by the organization. ([insert link to document](#))

Skilled Volunteers

Skill-based volunteer programs can be a part of the solution for nonprofit organizations struggling to sustain services and increase capacity. Skill-based volunteerism has been defined by the Points of Light Foundation/HandsOn Network as “the strategic alignment of personal talents, core business skills, experience, and/or education with the needs of local nonprofit agencies to meet community needs.” Skilled volunteers often bring new challenges to organizations and staff as they strive to effectively engage these volunteers. Meeting these challenges can result in significant benefits to the organizations. A study done by the Council on Aging with 60 nonprofit organizations over 3 years documents an average 800% return on investment for programs utilizing skilled volunteers in leadership positions.

Downloadable Resources

Skilled-Volunteering 101: Is Your Organization Ready to Engage? documents the results of a survey conducted by Common Impact with support from Capital One in 2009 . The publication provides a readiness survey, examples of successful volunteer engagements, and links to additional resources. [\(insert link to document\)](#)

“Skill-based Volunteer Programming—In A Nutshell” is one part of a toolkit available as a free download from Volunteer Centers of Michigan (VCM). The publication provides a condensed overview of the purpose and process for implementation of skilled volunteer positions. VCM’s Learning Center provides links to other documents including a workplan template. [\(insert link to document\)](#)

Vantage Point, formerly Volunteer Vancouver, has been a leader and strong advocate in the area of skilled volunteer programming. The organization’s publication--Skilled Volunteer Engagement—Case Study Analysis provides key learnings compiled from programs within nine nonprofit organizations. The appendix includes a sample interview process.

Vantage Point has also uploaded several videos to YouTube with success stories from staff and skilled volunteers. [\(insert link to document\)](#)

Online Resources

HandsOn Network offers a Skill-based Volunteering tutorial including the following topics:

- Why SBV
- How to Do SBV
- Useful Links and Resources

Access the tutorial at <http://www.handsonnetwork.org/nationalprograms/skillsbasedvolunteering>

Jffixler Group has published a resource book (Boomer Volunteer Engagement—Collaborate Today, Thrive Tomorrow) and facilitator’s handbook (Boomer Volunteer Engagement—Facilitator’s Toolkit) that provides a step-by-step planning and implementation process toward effective engagement of skilled volunteers. The organization’s website provides a variety of free templates such as several planning forms, a progress report, and position description template.

<http://www.jffixler.com/tools>

Corporate Engagement

Increasingly, businesses are encouraging their employees and retirees to get involved in local community service. Despite economic shifts, the business value of volunteering has never been stronger.

Today, employee volunteer programs offer time off to employees during work hours to enhance the company’s image in the community and promote employee loyalty and morale. Nonprofits working with employee volunteer programs must develop effective partnering strategies to be used when approaching a business. The nonprofit organization must then be prepared to develop volunteer opportunities that match the company’s goals as well as the employee volunteers’ needs and expectations while serving to meet community needs.

Downloadable Resources

“Engaging Employee Volunteers” –is a Points of Light publication that provides a variety of tools including a variety of tips and tools that will help any nonprofit prepare to effectively engage volunteers serving as a part of a Company/Corporate Volunteer Program. [\(Insert link—Engaging Employee Volunteers\)](#)

[A Guide to Investing In Volunteer Resources Management—Improving Your Philanthropic Portfolio](#), Tucker, P. ed. (2003) published by the UPS Foundation provides a venue for funders, corporations, government, and other stakeholders to learn more about how to invest in and support the structures that sustain effective volunteering. Includes checklists of ways to support volunteerism and volunteer resources management in local communities, tools and information to assess a nonprofit's capacity for volunteer engagement, and internet resources and other references for further information [\(Insert link—UPS Funders Guide\)](#)

Online Resources

“Readiness Roadmap” A guide for nonprofit used to determined readiness for engagement of pro-bono and skilled volunteers. Additional sections include:

- Needs Identification
- Project Readiness
- Sourcing
- Planning
- Implementation
- Evaluation
- Recognition & Celebration

<http://www.readinessroadmap.org>

A Billion+Change is a national campaign to mobilize billions of dollars of probono and skills-based service by 2013 to address core issues our communities face across the nation and around the world.

The site provides a variety of resources including a resource list from TapRoot foundation with links to research and tools related to effective Skilled Based and ProBono Volunteer engagement.

<http://www.abillionpluschange.org/resources>

Taproot Foundation has released a guide for nonprofits [Powered by ProBono](#) with plans and resources to help nonprofits be great pro bono partners. The guide can be purchased through Amazon. The Taproot website provides a variety of other related resources **including a free webinar**. View the additional resources and register for the webinar at:

<http://www.taprootfoundation.org/get-probono/be-powered-pro-bono>

Volunteer Management

Online Training Options

Risk Management

The Nonprofit Risk Management Center is an important resource. The organization's mission is to help nonprofit leaders become risk aware. The organization offers RISK HELP™ (a membership based help desk), Web tools, in-person and virtual training, and custom consulting solutions. Many of the tools such as the webinars are fee based or free or offered at a reduced cost to members. A free self-paced online tutorial specifically related to volunteer programming can be accessed at:

<http://www.nonprofitrisk.org/tools/volunteer/volunteer.shtml>

Volunteer Engagement

The Corporation for National and Community Service's resource center offers a variety of free online, self-paced tutorials: <http://www.nationalserviceresources.org/online-courses> These are free requiring only a simple registration process. Additional resources including a lending library can be accessed through the www.nationalresources.org site.

Everybody Ready is a volunteer training series offered through energizeinc.com. The Skill-building Center provides a library of 39 seminar and guides, available 24/7. The program is fee-based. Individuals can register and obtain access to one, individual webinar on a specific topic or for the series. Learn more about the program, topics, and enrollment options at: <http://www.everyoneready.info>

North Carolina University offers a distance-learning, online certificate degree. Applicants must possess a minimum of a 4 year degree from an accredited university. The certificate requires 12 hours of graduate coursework. Learn more about the program at: http://online.northcarolina.edu/unconline/program_detail.

Volunteer Centers of Michigan has developed a variety of volunteer training materials in partnership with the Michigan Community Service Commission as a part of the Volunteer Generation Fund Grant. These free "toolkits" include a powerpoint presentation, accompanying script, a resource page, fact sheet, and related template or other tool. Live webinars are presented monthly through the parent organization, Michigan Nonprofit Association's ENGAGE series. Go to the organization's Learning Center to access the toolkits and to register for the live webinars: <http://www.mivolunteers.org/learningcenter.aspx>

VolunteerMatch offers a variety of tools and services to facilitate volunteer engagement at the local level. The organization offers monthly webinars on a variety of topics related to volunteer engagement. The webinars are offered at three levels:

- Introductory Approaches—Basic ideas or theories in volunteer engagement as well as introductory materials explaining Volunteer Match's tools.
- Core Components—Common building blocks in a volunteer engagement program
- Advanced Practices—Topics in volunteer engagement from a wider perspective.

Access more detailed information and register for specific webinar offerings at:

<http://learn.volunteermatch.org>