



WORKSHEET

Questions to Answer before Planning (or Redesigning) Volunteer Involvement

*Before responding to the questions below, review the organization's **mission statement**. Then review the **statement of philosophy of volunteer involvement** that you developed in the previous section—or go back and develop one. These documents lay the foundation for the planning that follows.*

1. Who has a stake in creating or strengthening our volunteer involvement and, therefore, should be involved in planning for it?

2. How can volunteers contribute to meeting our organization's mission, strategies, and goals?

3. What type of volunteers do we most want to attract (consider backgrounds, age, ethnicity, professions, etc.)? Why?

4. What specific roles do we see volunteers playing in our organization and what do we expect volunteers to accomplish?

5. What policies and procedures must be developed or revised to give operational support to volunteer engagement?

6. Who will lead our volunteer engagement effort and where will the position be placed in the organization? What is our rationale for these decisions?

(continued)



Questions to Answer before Planning
(or Redesigning) Volunteer Involvement
(continued)

7. What resources (financial and in-kind) do we have or will we generate to support volunteer engagement?

8. Are staff committed to and competent in partnering with volunteers? Will we need to work through any staff resistance? What training will we need to provide to staff who partner with volunteers?

9. How will planning for volunteers be integrated with overall agency planning?



ACTION STEPS

Planning a Volunteer Involvement Strategy

If you are establishing a volunteer initiative you should become familiar with the critical steps in preparing an organization to develop a strong foundation for volunteer involvement. All the steps need to be taken, but are not cleanly sequential; some overlap or need to be done simultaneously. Some can be carried out by one person or a combination of staff and volunteers. As applicable, we refer to other sections of the Toolkit (and elsewhere) where you can find materials to help you with each task.

Step 1

Think It Through

- Formulate your organization's philosophy of volunteer engagement (See Section 1.)
- Carry out a needs assessment to determine organizational readiness to engage volunteers. (See Section 2.)
- Research and address risk management, insurance and legal issues in working with volunteers. (See Section 9. A great resource is www.nonprofitrisk.org.)
- Include volunteer involvement in the strategic planning of the organization. (See Section 2.)

Step 2

Designate Leadership and Allocate Resources

- Determine who will lead volunteer engagement and the best placement of that position within the organization. (See Section 4.)
- Determine appropriate resources needed to support volunteer engagement and create a corresponding budget to cover those needed resources. (See Section 3.)

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Planning a Volunteer Involvement Strategy

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Step 3:

Engage and Prepare the Entire Organization

- Determine expectations of staff who will partner with volunteers and include this responsibility in staff job and position descriptions. (See Section 6.)
- Design and conduct training for all staff and leadership volunteers who will partner with volunteers. (See Section 6.)
- Include staff and volunteers in the planning of volunteer involvement for their area of work.

Step 4:

Implement Best Practices in Engaging Volunteers—Ideally Initiated by the Director of Volunteer Involvement

- Create volunteer positions related to organizational priorities, staff needs, and client needs.
- In concert with upper management, develop essential guidelines, processes and policies related to volunteer engagement with the organization.
- Design appropriate screening techniques relative to volunteer positions.
- Develop orientation and training plans for volunteers.
- Select the best recordkeeping system to keep track of position descriptions, volunteers' histories of service to organization, recognition awarded, insurance updates, training records, etc.—and to generate necessary reports.
- Make certain that volunteer opportunities are prominent on the organization's Web site and in all organizational literature.
- Develop and implement a recruitment strategy.
- Prepare annual goals and objectives tied to the organization's strategic plan.



EXECUTIVE SELF-ASSESSMENT

Do I plan for volunteer involvement and develop appropriate policies with these actions?

1. I lead discussions regarding our desires for initiating (or re-designing) our volunteer involvement strategy.
 Yes No Sometimes Will now initiate Not relevant
2. I conduct needs assessments or review the results of these assessments to gather significant information to design or redesign volunteer engagement within our organization.
 Yes No Sometimes Will now initiate Not relevant
3. I am aware of the major steps for initiating volunteer involvement and have led or supported these planning/action steps.
 Yes No Sometimes Will now initiate Not relevant
4. I encourage all functions, programs, and units of the organization (including volunteer services) to annually design priorities/goals for the upcoming year with action plans to achieve them.
 Yes No Sometimes Will now initiate Not relevant
5. I support involvement of the leader of volunteer resources in strategic planning for the organization.
 Yes No Sometimes Will now initiate Not relevant
6. I invite the input of volunteers themselves at appropriate phases of our strategic planning.
 Yes No Sometimes Will now initiate Not relevant
7. As I expect of all staff, I design positions for volunteers to report to me that are in alignment with our strategic priorities/goals.
 Yes No Sometimes Will now initiate Not relevant
8. Working with my board of directors and senior management, I lead or monitor efforts to create policies and procedures that will ensure the most effective volunteer involvement in our organization.
 Yes No Sometimes Will now initiate Not relevant



CHECKLIST

Other Resource Allocation

The following items which support volunteers may already be available in your organization. Even though these may not require a new line item in the budget, you may want to “charge” them to the volunteer office or need to raise the amount of money allocated to them to accommodate increased use by volunteers.

Staff time

- Time required to orient, train, and support volunteers by front line staff members designated as their supervisors or liaisons
- Collaboration from departments or staff whose special expertise is needed by the volunteer program, such as marketing, Internet technology, budget/finance, fund development, etc.

Space

- Adequate work space for the volunteer program staff and volunteers
- Private interviewing area
- Locked area for volunteers to leave personal belongings
- Training and meeting rooms
- Other:

Maintenance services

- Setting up rooms for volunteer training/ orientation/events
- Cleaning of area used by volunteers
- Other:

Volunteer benefits

Items on this list may or may not be applicable, based on the positions volunteers fill, the amount of time they spend on site, and the facility itself (i.e., whether safety goggles must be worn or if there is a cafeteria).

- Coffee, tea and snacks
- Meals on days worked
- Parking privileges
- Free admission to facility events/ performances
- Discounts in facility store
- Free learning opportunities/training
- Other:
