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Refer to the graphics below to best navigate the handbook and find what you are looking for.

Key: these quick tips can help you unlock the crucial, but perhaps subtle, truths of volunteer management.

Toolbox: look for this picture to find easy to use tools for your volunteer program development.

Question: find our answer to frequently asked questions.
Introduction: Purpose—Creating and Managing an Effective Volunteer Program

The Volunteer Center of Sonoma County is pleased to offer you this template as a guide for volunteer coordinators to use in discovering, recruiting, organizing and managing your volunteer workforce. This manual can serve as a valuable resource that a Volunteer Coordinator can refer to during their service within your agency. By using this as a foundation, it can also be a resource to build a Volunteer Handbook that will outline the specific expectations, policies and procedures for your organization (see Appendix).

Of course, the needs of every organization will be different, depending on the size, culture, nature and purpose of volunteers in service to your cause.

The template presented here covers all areas of a Volunteer Coordinator’s responsibility, and you may use all of the information provided, or selectively as your needs warrant. If, after reviewing this template, you have ideas to share with us in regards to a Volunteer Coordinator’s role and responsibilities, we would be happy to receive your input.

The Volunteer Coordinator Role

Your Volunteer Program, and the Volunteer Coordinator as a representative of that program, needs to have buy-in of your board and leadership positions within the organization. You can get buy in by showing the impact and potential of a volunteer program. Try to put a dollar amount on the value of having and utilizing volunteers. Advocate for yourself and ask for support when you need it. Define your job so it is
clear what you are responsible for—do not be shy! Realize that you are ultimately responsible for all of the agency’s volunteers. Even though there may be other leaders, they will be looking to you to support them in supervising their volunteers. Practice what you preach!

Here are some important pointers on being an effective Volunteer Coordinator:

1. Delegate: feel comfortable in giving responsibilities to those who have earned your trust and shown they want to contribute more.

2. Prepare! New volunteers will sense if you are not prepared for them when they walk through the door. Have a list of your needs based on your organization’s assessment, and review the Volunteer Handbook (if you have one) beforehand.

3. Ask them why they are volunteering, what they hope to get from the experience and keep that in mind as you build a relationship with your volunteers. If they are unhappy with the volunteer process within your organization, they will stay and have a negative impact on the organization, or they will leave.

4. Feel free to check in with your volunteers and ask them if what they are doing meets their expectations. You do not have to wait to do evaluations until the end. Start small casual conversations in order to get a feel for the mindset of your volunteers.
5. Inform them on how their work is playing a part of the bigger picture—the MISSION!

**The Right Kind of Supervision**

Be sure to outline from the beginning what the expectations are for the volunteer. Make sure you and the volunteer are on the same page with their job responsibilities. Have them sign an agreement for the expectations that are generic for all volunteers of your agency. These expectations should be in a Volunteer Handbook that is similar to an Employee Handbook. Make sure there are clear boundaries of what the volunteer is working on and additionally, make sure you are respecting their boundaries—and not asking them to take on responsibilities that they did not sign up for. If you need to add to their job description, invite them in for a conversation about that.

**Needs Assessment**

Any agency that wishes to create a volunteer program must first assess whether or not there are justifications for creating such a program. This type of assessment is accomplished by taking the time and effort to determine if the agency is an appropriate environment for volunteers; if the agency truly needs volunteers; and if the agency will be able to support volunteers.

*What is an Appropriate Environment for Volunteers?*

An agency that can utilize volunteers effectively must have an open system that allows change and the external environment to contribute to
the growth of the organization. The culture of the organization must have open communication amongst staff and volunteers, and a capacity to celebrate and recognize the contributions of everyone. The physical environment needs to be accessible and organized; otherwise, volunteers will not feel comfortable and willing to help in what may appear to be a disorganized, unfriendly atmosphere. There needs to be a consistent recognition amongst staff of the value of volunteers, so when a volunteer walks through the door or down the hallway, they are greeted with warmth and feel appreciated for helping the organization accomplish its mission.

Is There a Need for Volunteers?

It is extremely important for any agency to prove that volunteers are a necessity. This can be accomplished by either clearly identifying tasks that will serve as a framework for various volunteer positions and will complement the jobs of paid employees or fill voids that paid employees are unable to fill. In order to ensure that the presence of volunteers will have a positive effect, the agency can implement brainstorming sessions with the volunteer coordinator and any employees who will work with and/or manage volunteers. The agency may also choose to set up an advisory team, conduct surveys, use questionnaires, and/or create a suggestion box to gather feedback from staff.
Needs Assessment questions may include:

- Does the agency have the infrastructure and resources needed to train and support volunteers?
- Will a volunteer program benefit both the agency and volunteers?
- Have volunteer positions been clearly identified?
- Has creativity been used to develop specific volunteer positions that go beyond what employees can do and attract a diverse group of volunteers?
- Do volunteer positions provide meaningful, goal-oriented work? Are they realistic and practical?
- What types of volunteers are needed (e.g., long-term, short-term, episodic, family, intern, student, virtual, micro, group, individual, experienced, etc.)?
- Where (off-site or on-site), when (daytime, evening, or weekend hours), and how often (daily, weekly, monthly, etc.) are volunteers needed?
- Have agency employees been included in the assessment process? Have they been asked to discuss their experiences with volunteers/volunteering, how comfortable they are with the idea of working with volunteers, and if they have any concerns regarding volunteers?
• Are written policies and procedures in place to protect the agency, its employees, and volunteers?

*Can the Agency Support Volunteers?*

Like employees, volunteers need support and guidance from the organization. Although the Human Resources department may not cover volunteers formally, informally the agency needs to respond in some way to the relationship building that is required for volunteers.

*Some points to consider when developing a supportive role:*

- How will the volunteer position have a positive effect on the volunteers?
- Does each volunteer know whom he or she should report to and inform when he or she has an issue with his or her position?
- Is there consistent communication between the supervisor and volunteer?
- Is everything clarified from the beginning, allowing time for questions and feedback?

*After an assessment has proved that volunteers are needed, descriptions of volunteer positions can then be created.*
Identifying Volunteer Opportunities

To find the right volunteers, you need to have a clear understanding of the different jobs available within the organization. Begin with the experts in your organization, your staff.

Treat this like a job and involve the right people when deciding what types of volunteers could be used throughout the agency.

Questions for your staff:

- What kind of support could you use to run your program?
- What tasks would you like to delegate to a volunteer?
- Describe the responsibilities the volunteer would have?
- What skills and experience do you want the volunteer to come in with?
- What other expectations would you have for them?
- Do you have the necessary supplies for the volunteer to be able to complete the given job? Do you have the time to supervise them?
- What is your availability to meet with potential volunteers?
- What kind of support would you need from the Volunteer Coordinator to ensure a successful volunteer match?
Writing Volunteer Job Descriptions

The creation of a volunteer job is part of the recruitment process and requires a good deal of time, care, and effort. **Specificity is the key** in creating a strong volunteer job description that benefits both the potential volunteer and any individual or group who will work with or supervise the volunteer. The use of specific language in a volunteer role description increases the chance that there will be an excellent fit between a volunteer and his or her duties. For example, if a role requires a volunteer to work on an environmental restoration project, it is much more helpful and informative to a potential volunteer to read a specific description like “planting baby redwoods,” than it is for them to see a broad label like “forest restoration.”

**Important qualifications** required of such a volunteer would obviously be ones of physical health and strength, but what if the volunteer wishes to support the cause of forest restoration, yet is not inclined to be physically active. In this case, the volunteer still has valuable talents that may fit into a more creatively defined volunteer role. For instance, if a volunteer happens to be an artist, use his or her skills to design flyers to inform other people, including more potential volunteers, about the importance of forest restoration.

**Creativity, flexibility, and keeping it “short and simple”** are just as important as being specific when creating a volunteer role description. You want to make it appealing, open to compromise, and quick and easy to read.
In many ways, it is like an advertisement—you want volunteers, but you also want those volunteers to want to volunteer.

There are many different levels of volunteering:

- Long-term, short-term, and episodic
- Daytime, evening, and weekend
- Weekly, fortnightly, and monthly
- Onsite, offsite, and virtual (e-volunteering)
- Individual, family, internship, and student
- New, current, and previously worked with volunteers

Awareness of the wide range of volunteering possibilities adds to the effectiveness with which one can use creativity to attract as diverse a range of volunteers as possible.

A volunteer role description can include:

- Role title
- Date (creation or revision)
- Goals / purpose / major objectives
- Duties / major responsibilities / activities / tasks
- Qualifications / experience / skills / requirements / education / references / applications / equipment / background check
☐ Training and support (which may include orientation, job-specific training, or on-the-job training)

☐ Benefits, both tangible and less tangible (like discounts vs. job experience)

☐ Time commitment

☐ Organization’s name and location of site

☐ Contact / supervisor information

☐ Special or very detailed information that might help a potential volunteer to self-screen

☐ Desired attitude and personality

When choosing the information to include for a particular volunteer role, try to imagine which sections would be most important to a volunteer and in what order he or she would want to know read those sections.

Keep in mind that volunteer role descriptions do not only provide for the present; they also provide for the future. When creating a volunteer role description, take into consideration the fact that it will most likely be used as a guideline for those who work with the volunteer, as well as a tool for evaluation, recognition, reprimands, resolution, and even termination.
Volunteer Benefits

Most potential volunteers consider volunteering as an exchange. These people find themselves in need at some point in their lives. Today you may be the person with the ability to help, but tomorrow you may be the recipient of someone else's efforts. Adding your effort to the work of others makes everyone's lives better and builds the strength of your community.

People volunteer for a wide variety of reasons. Be able to point out the many benefits for the volunteer they may not be aware of.

Listed below are just some of the reasons people volunteer:

- Want to use volunteering to explore a career, sharpen skills, gain leadership experience, add to a resume, or try something that is different from their job

- Have a wish to help people, show commitment to a cause, perform their civic duty, demonstrate adherence to their religious beliefs, be an agent of change, or pay back a debt

- Would like to share professional skills, stay busy, gain knowledge about a community, participate in a team effort, find new friends, or pass a personal test

- Have been pressured by friends or family

- Desire recognition, a sense of accomplishment, a challenge, a feeling of pride, therapeutic endeavors, fun, academic credit, an escape,
fantasy fulfillment, status, a chance to do what they love the most, or a position inside of an agency

- Are allowed to perform their volunteer role from home
- Were personally asked to volunteer, recognized that there was no one else to perform a certain role, or had personal experience with a particular cause

The last point on the list is an excellent example of potential volunteers you may overlook if you do not think outside the box—individuals who have a personal experience with a cause. These individuals may even be your own clients—receivers who can become givers. Like much in life, volunteering is not black and white. At times, volunteers turn into clients, and clients turn into volunteers. Sometimes, an individual can even be both. It is all about give and take. That is one very good reason why volunteering is thought of as an exchange.

You probably have some special reasons of your own. Once you are actually in a Volunteer Coordinator role, you are more than likely able to discover new reasons.

**The Role of a Volunteer Leader**

When you have multiple programs going on at once, it is very beneficial to create leadership roles with volunteers that have lots of experience volunteering with your agency. Delegation will save you from becoming overwhelmed. Target your efforts at creating a core team of leaders made up of these alumni volunteers that supervise sub-teams based on
job similarity. Be sure to develop a job description for the leadership role and be clear on boundaries so there is no misstep.

**Orientation and Training**

Once your volunteers are signed and on board, give them an orientation of the entire organization and then specifically the program that they will be working with. Again, treat them like you would a new hire.

Here are some ways to have effective orientation and training:

- Introduce them to the staff so they feel a part of the family.
- Orientation should include ethics, codes, procedures, cultural norms, standard practices so they are not caught off guard too much when starting.
- Training should be prepared ahead of time and consistent with the job.
- Have the staff that will be supervising do the training if possible.
- Make sure it is a person in the same department so they know whom to turn to with questions and do not leave the training with confusion.
- Provide handouts, and let them know where they can find resources so they do not have to take too much home.
- Provide a workspace for them if possible, as this will help them stay organized, present and feel a part of things.
- Be clear in the training about expectations and goals for the job they are signing up for.
Emerging Models: Youth, Family, Boomers and Senior Volunteers

Youth (ages 6-12): young children should have a parent with them at all times. When you advertise a volunteer opportunity be sure to state this. Have the parent sign a waiver for the youth that covers liability concerns. Do not provide transportation to youth; recommend the parent drive his or her child (ren). Youth are great for simple tasks and can only commit to very short-term hours and opportunities.

Youth (ages 13-17): Be sure to get a waiver/volunteer form signed by a parent. They can volunteer without a guardian if it is covered in your liability. Their parents should provide transportation, otherwise you will need to get the parent to sign a form and have the proper insurance. Also, check with your insurance about covering volunteers that are driving on behalf of your organization in case of an accident. Teens are looking for opportunities that match their interests and career goals. They are very self-focused so be prepared to explain how they can benefit from the opportunity.

They are great for computer work, social media and other technology opportunities because of their skills. However, do not assume! Some teens do not have many computer skills and do not use social media. Teens are great for receptionist jobs, but make sure you train, train, and train! They will most likely need guidance on all levels, including how to be confident and polite on the phone, and why it does matter that they file correctly, etc.

Explain how what they do is part of the bigger picture; otherwise they will just feel like you are another adult taking advantage. Let them know the
good they are doing. They will not start with that as the reason they are volunteering, but it will become a take away. Ask them about their interests, career goals, and if they are not sure, spark up conversation around things they care about. This will help them see how to be social with other generations and again feel they are appreciated.

Let them lead! They have more power and energy than we sometimes recognize, so provide the guidance and support for them to lead on something they care about and are excited about. Offer opportunities, watch to see their eyes open up and their attention to perk up, and then see how to utilize that small flame to get them to lead. Do not overwhelm them with steps or they may get scared and phase out. Provide just a few steps at a time, ask for their thoughts, and help them find the resources they need. Congratulate them on the steps they take so they can know what they are doing is effective. Encourage and support!

Young Adults (18-29): At this age, young adults are still trying to figure out whom they are and what they want to do with their life. If they are in college, they may have a better idea and they will volunteer only where it coincides with those goals. If they are not already on a path, they may flounder, volunteering for different things here and there without committing because they are unsure. Allow them time to consider an opportunity before asking them to commit. Ask them to volunteer for a small, one time project to try out the organization. You would be trying them out too so both can get a feel if it is a right fit. If it is what they want, and they work well with your organization, they will stay and you will be thrilled.
Adults (30-55): As mentioned in Retention/Recognition, this group is very active. They may have kids, a job, other volunteer work, and social events to attend, so you have to keep up with them. They may only be able to commit for shorter-term opportunities, although they will have the skills you need. So find projects that they can come in, complete and move on afterwards. This age group has a lot of energy but is focused on multiple things, so utilize that energy without expecting too much from them.

Seniors (55+): This generation is renaming itself. They are more likely still working, travelling and staying active. They have energy and want to give back to their community. They have wonderful skills from years in a field, so if they want to work in the same field as their career, and place them where they will feel appreciated. They are less likely to want to stuff envelopes than manage a meeting or create a new marketing plan. Those that are interested in the labor intensive jobs more likely want to do it as a social event, so have groups helping on these projects. If you find a loner that wants to fold brochures, let them, but also check in, say hi, and strike up a conversation so they know they are appreciated too!

Risk Management

Procedures are great! Make sure you have procedures in place as well as a volunteer handbook that covers almost everything you would find in an employee handbook (see Appendix). Talk with your finance and Human Resources Department about liability and worker’s comp if applicable, Learn about what is covered, what is not, what kind of waiver needs to be
signed, job descriptions, volunteer policy statement, ethics etc. Be sure to have volunteers listed as part of the organization chart so it is clear who is responsible for the volunteers. Board committees need to be involved to create policies, but staff can support in enforcing them.

**Budgeting**

Think this through! When creating a budget, think of all the aspects of your volunteer program that bring a cost or use a resource in the organization. Consider staff time for not just interviewing, training and orientation but also supervision or planning recognition events or gifts of appreciation. If a volunteer were providing a service, you would have normally had to pay for, talk with your finance committee about making this an in-kind donation so it shows in the books. Allow some room in your budget to cover recognition so it does not come out of another department or your own pocket. If you do not have much of a budget for your volunteer program, be creative. Have a potluck or have the clients of your organization make gifts/cards for the volunteers that affected their lives. Consider whether you will cover the cost of gas if the volunteers are driving for your organization and include that in the budget. (See Example Volunteer Program Budget in Appendix)

**Social Media and Marketing**

People are using social media to find out about upcoming events and volunteer opportunities. Whether you are a Facebook Fanatic or a Social Media Novice, technology has become the vehicle of the century for conducting outreach, marketing and PR.
When telling your story, always relate it to a current event so it grabs people’s attention. Child obesity has been an issue for many years, but if you share how the White House made obesity for teen children their number one priority for 2011, people will wake up and want to be a part of the movement. Make it a movement they want to be caught up in by making it fresh and exciting. Talk about the benefits. To get them in the door, talk about how they can meet new people, try something new, gain new skills/experience, be an expert and help with a project, help start a new initiative, travel, see a new part of Sonoma County no one else can see, etc. Do not sound desperate; rather make it sound like a thrill ride they are about to experience! Share your stories and pictures in Social Media and be sure to get volunteer’s permission for both, or change the name. They like to pass a page on that mentions them to their friends.

Social Media Tips

★ Facebook: Post your opportunities on Facebook, and keep them updated. Be sure to have it linked to your website.

★ Twitter: use Twitter to give a heads up on upcoming opportunities. Example: This Saturday, Volunteer for Park Clean Up.

★ YouTube: post videos on YouTube that show you interviewing volunteers on their experience. Have them share why they volunteered and what it was like. Keep it short, less than 4 minutes recommended unless it is a major PR tool.

Use every avenue to spread the word, but always remember the best way to recruit is word of mouth!
The Three R’s: Recruitment, Retention and Recognition

Section I

Recruitment

The most effective recruitment of volunteers across the board comes from personal referral by a friend. This is why it is vital that you treat your volunteers well—because in most cases, if they have had a positive experience from volunteering with your agency, they will tell others of their experience.

Beyond a personal recommendation...

- word of mouth in general
- mobile media for all generations
- website searches and Google
- business connections
- networking
- professional groups
- libraries and universities
Be sure to develop an ongoing relationship with your local Volunteer Center/Referral Service Agency and provide updated information about opportunities so they can refer volunteers to match your needs.

Tell professors at local universities, because students often have to complete internship hours. Just make sure it is entry level, as they are still in the learning stage.

Volunteers see volunteering as a part of healthy living, so market it that way. Volunteers want to meet up with people of like mind and find potential relationships while volunteering, so keep that in mind when you plan something that can provide networking opportunities.

Recruitment is a natural extension of a volunteer needs assessment and the creation of volunteer role descriptions. When assessing your agency’s volunteer needs, you probably became more aware of your agency’s goals, and when creating your volunteer role descriptions, you became more aware of the diversity of potential volunteers. By building upon these two foundations of awareness, you will be able to construct a solid and effective recruitment strategy that is beneficial to your organization, your employees, and both your current and future volunteers.

**Recruitment Part 1: General Information**

There are attitudes, which are obstacles to recruiting, just as there are stereotypes that are obstacles to volunteering. People tend to think recruitment is complicated, time-consuming, and tiresome. Oftentimes, a recruiter may reach a point where he or she will feel pressured to find
anybody that they can find for a position. The reality, however, is that recruitment is not a problem, nor a chore.

**It is a process**—a process of rejuvenation that keeps an agency active, efficient, and up-to-date. Just as you wish for potential volunteers to have a positive view of volunteering, you and your recruiters must keep a positive attitude about recruitment. The best way to remain positive is to prepare and plan.

**Recruitment Part 2: Your Agency**

One very important way in which you can prepare for recruitment is to look at your own agency, just as you did when you assessed your volunteer needs.

The pieces to focus on:

- Organization’s mission and vision statement
- Goals of the program where volunteers are needed
- Volunteer policies- be sure they attract and protect volunteers
- Benefits to the volunteer
- How the volunteer programs will benefit the community

Having a clear sense of your organization is a crucial step in the recruitment process. After all, if you are not well versed about your own agency, how can you expect to know where improvements need to be
made? In addition, how can you expect the public, including potential volunteers, to know what you do and what you offer? Such questions also bring up another critical question: How well do employees and current volunteers know about your agency and your recruitment efforts?

Your agency’s employees and current volunteers are the faces of your agency. They are the people who the public, neighbors, and potential volunteers will look to in order to determine the views and effectiveness of your agency. The advantage of this is that you can form partnerships, task forces, meetings, and brainstorming sessions to help the recruitment process to proceed swiftly and smoothly.

To ensure a positive workplace, you may also find it wise to:

- Ensure that current volunteers will accept new volunteers (for volunteers who are resistant: get their buy-in by bringing them into the conversation. Ask what they see as needed within the organization?)
- Ask current volunteers to offer new ideas about ways of recruiting
- Send out current volunteers to recruit potential volunteers
- Let everyone in your agency, from receptionists to program directors, and from custodians to colleagues, know when you are in the middle of a recruitment campaign

Not only are employees and current volunteers your faces, they are also your voices. The language that you, your employees, and your current volunteers
use is just as important as the role descriptions that you created with creativity, specificity, and diversity.

It is important to speak with:

- Honesty
- Sincerity
- Accuracy
- Clarity

In order to attract potential volunteers, it is imperative that you treat them with the utmost respect and provide full disclosure regarding your agency and what volunteer roles will entail. There is nothing less appealing to a potential volunteer than vague, unnecessary, misleading information, especially if this information is eventually followed up by a casual “Oh, there’s a few more things that I need you to do” after the volunteer has been recruited. No one wants to be dragged into something that they did not sign up for, so tread carefully and prepare, prepare, prepare! Any form of communication that has the slightest chance of being misinterpreted, will be misinterpreted.

A potential volunteer’s reception is critical to getting him or her to the interviewing stage and beyond!
Potential volunteers respond well to an agency that is:

- Welcoming, easy, relaxed, informal, personal, and respectful
- Efficient, effective, well-staffed, organized, controlled, and secure
- Positive, flexible, professional, and informative

Potential volunteers also respond well to an agency that:

- Will see to it that they are well-managed and well-used
- Has multiple points of access, including walk-in, call-in, and e-mail

Another way to make access appealing and comfortable to potential volunteers is to set up points of access in your neighborhood and throughout your community.

How well does your community and the public know about your agency’s mission, needs, and goals? This once again brings up the question of how well your employees and current volunteers know the agency that they represent. You can test their knowledge by having a meeting and asking each person to contribute a few of their beliefs about which parts of your agency matter most to the public. You will probably encounter a wide range of differently worded input. This presents the opportunity to get your employees, volunteers, neighbors, and the public on the same page.
This may not fit your organization, depending on whether you have a set community to attract. It may be a virtual target population or a local one, either way, assessment is key.

Never work with the assumption that people know about your agency. Your potential pool of volunteers probably do not, otherwise they would already be in the door.

In order to determine what and how much the public and your community actually know, or do not know, you can:

- Send out questionnaires
- Take surveys
- Collect media references about your agency
- Figure out if, and how often, news media contact you regarding events, etc., that you are associated with
- Find out how many people call you because they think you do something entirely different from what you actually do
- Be welcoming of neighbors and visitors who drop-in out of curiosity

It will be beneficial to both you and your community if you can form healthy and lasting relationships with each other. One way you can start these relationships is to learn as much as you can about your neighborhood and the community. You ought to be able to know as much about them as you wish them to know about you. As has been recently mentioned, you can personally exchange information by welcoming community members who drop by your agency.
When just getting started, get better acquainted with your community:

- Start with neighbors closest to your agency, such as on your block
- Physically study your block, either by walking or driving
- Walking can be more effective than driving because it is easier to see neighbors that are not as noticeable from the road and are not on the most common route to your agency
- If you are in a high-rise or shared building, start with your “indoor” neighbors first
- Slowly work your way out like a ripple in a pond until you feel you have gathered enough names and addresses for your purpose

After you have collected the names and addresses of key community members, and looked up their phone numbers, send them flyers, letters, or brochures. It would probably be best to separate neighbors into small, manageable groups so you can send out your materials one group at a time to prevent feeling overwhelmed. Sending out materials and venturing into your neighborhood, and the community, with outdated information can be just as unconstructive as the public having no information at all. Make sure that you freshen up and correct old materials, informational handouts, your website, etc. The goal is to banish stereotypes while modernizing and normalizing the act of volunteering in the minds of the public.
Recruitment Part 3: Potential Volunteers

The most important concept of volunteering is that it is an act that people perform willingly without being coerced or forced into performing it. It embodies freedom of choice. However, what exactly is it that causes an individual to make, or not to make, that choice?

Part of what makes a recruitment strategy effective is to approach it by thinking like both a current and potential volunteer. To cultivate this kind of thinking, you may want to:

- Use your imagination to make a list of what volunteers feel is most important for their present and future roles
- Go undercover and find out what it is like to ask to be a volunteer for your agency
- Ask current volunteers how, and why, they chose to volunteer
- Give recruitment materials to test groups comprised of people who know next to nothing about your organization and ask them to point out information that confuses them, bothers them, attracts them, etc.
- Consider what types of people are not currently volunteering for your agency and figure out how you can increase diversity while avoiding tokenism

By going through a volunteer’s thinking process, you will have a better idea of why a potential volunteer chooses to volunteer, as well as why a potential volunteer chooses not to volunteer.
What prevents potential volunteers from volunteering?

- Disrespectful language, representatives, or reception
- Fear that they will lose benefits
- Expenses / low income
- Children and other dependents
- Confusion over what someone with a criminal record is allowed to do
- Stereotypes / distorted views
- A nonexistent volunteer policy
- A belief that individual needs will not be met
- A belief that they will not be consulted, appreciated, or used appropriately
- Insufficient help / lack of accommodation
- Too little information
- Too few access points
- Discomfort caused by not knowing any family members, friends, or acquaintances who are volunteers
- Worry that stems from thinking that age is a barrier to volunteering
- Anxiety about getting along with other volunteers and the possibility of making paid employees feel threatened

What motivates potential volunteers to volunteer?

Refer to the earlier section on “Volunteer Benefits, Pages 15-16 for a more complete list.
Other potential volunteers you might overlook are highly skilled individuals who come forward unexpectedly with an offer of help. Many organizations are not prepared for such unexpected offers. Is yours? Also, try not to discriminate against an individual of a particular age if he or she wants to apply for a role that is usually performed by an individual of a much different age. Youth, seniors, and people of all ages in-between need to know how valuable they are to the community. You may want to reserve a space on your volunteer “wish list” for anyone who might fit into more unique roles such as these.

Remember; do not assume that a potential volunteer who says “no” means “no” forever. Situations change all the time. Besides, having people listen to you, even if they say “no,” is still a positive experience because you are spreading your information out into the community. In addition, if you are unable to find a specific person for a specific role, relax. Give the role description a tune-up or set it aside for a while to ripen. In the end, it is far better to take the time to cast the right individual in the right role than to rush to fill an empty spot.

**Recruitment Part 4: Markets, Methods, and Materials**

Before you arrived at the heart of the recruitment process, you already gathered the information needed for recruitment materials when you developed volunteer role descriptions. Your volunteer role descriptions can also be useful guidelines for finding recruitment markets if you take into account the specific age, health, occupation, time commitment, gender, and geographic location requirements that you have woven into each role. Do
not forget to use your neighbors as resources, too. They can serve as access points for volunteers, markets for posting recruitment materials, and places to hold face-to-face meetings with potential volunteers. You may also find it helpful to ask your current volunteers about the types of places that they were recruited from.

Recruitment markets may include:

- **Places of education**: Schools, colleges, universities, sororities, fraternities, libraries, career centers, vocational training programs, or PTA meetings

- **Public Gatherings**: Conferences, special events, conventions, county fairs, parades, farmer’s markets, auctions, festivals, holiday festivities, or book fairs

- **Houses of worship**: Churches, synagogues, mosques, temples, or shrines

- **Recreational areas**: Beaches, neighborhood parks, regional parks, state parks, national parks, national seashores, nature preserves, vacation spots, or tourist destinations

- **Cultural centers**: Concert halls, museums, historic sites, art galleries, movie theatres, or performing arts theatres / centers
- Social hotspots: Malls, local stores, coffee shops, restaurants, hair salons, fitness centers, sports events, or parties

- Government agencies and public services: Chambers of commerce, the military, the coast guard, city councils, the United States Postal Service, police and fire departments, employment assistance programs, rehabilitation agencies, job training programs, prisons, or public transportation

- Businesses: Corporations, small businesses, wineries, unions, trade associations, factories, telephone companies, airlines, hotels, janitorial services, computer services, or the self-employed

- Health-related: Hospitals, clinics, family practices, residential treatment programs, or mental health services

- Miscellaneous: AmeriCorps programs, advocacy groups, United Way, senior centers, retirement organizations, Girl Scouts, Boy Scouts, Kiwanis, Rotary Clubs, junior leagues, minority communities, or job seekers

- Media: Newspapers, billboards, school sports program booklets, yearbooks, magazines, mailing lists, workplace emails, playbills / theatre programs, radio, television, cable, satellite, public broadcasting, newsletters and social media.
Online recruitment can be very helpful if you do not have enough people to send out to recruit volunteers in person. It also helps to attract younger, tech-savvy volunteers. Apply information you have learned about current and potential volunteers to your website.

Keep your site up-to-date, inviting, highly informative, clear, specific, and simple. Quick online forms and easy email contacts are sure to interest more individuals than downloads, printouts, a list of phone numbers, or street addresses would.

A few recruitment methods that you might consider using online are commercials on podcasts and advertisements on specific websites, such as VolunteerMatch.org.

Commercials and advertisements can also be effective in the "physical world," so do not forget to consider:

- Posters
- Banners
- Flyers
- Business cards
- Slideshows
- Information booths
- Talks, or question and registration nights
- Press releases
- Brochures
- Word of mouth
- Road shows
- Portable signs
- Presentations,
Remember to research the best ways to create and utilize the methods you choose. For example, there are specific steps that you must follow when writing the pitch letter for a press release. Also, do not underestimate the importance of face-to-face methods, despite the popularity and convenience of the Internet. Some individuals may feel that face-to-face meetings are too “old-fashioned” compared to the various material and online methods, but in the end it is still a way to personalize recruiting, especially if current volunteers are the ones doing the recruiting.

Material and online methods need to be personalized as well. No one can identify with pure facts and information surrounded by photographs of smiling, nameless models that have nothing to do with your organization, much less your community. Once again, the words to employ are creativity, specificity, and diversity.

Some creative ways to gather testimonials:

- Ask a wide variety of current volunteers for testimonials that you can use in your material and online methods
- Give the volunteers specific questions so that their answers will, in turn, be specific
- Record testimonials in writing and with video or voice recording equipment so you can use quotes in more than one medium
- Do not use testimonials or quotes until you have received written permission from the volunteer
Group a volunteer’s image and name with their individual testimonial or quote in your material and online methods.

As you utilize your material, online, and face-to-face methods, it is possible that you will come to recognize how attractive the benefits are to potential volunteers. **It is extremely important to potential volunteers that the benefits of volunteering outweigh the costs.** You should never feel that it is wrong to talk about, or even highlight, the benefits of being a volunteer. However, do not rely too heavily upon the appeal of benefits by making them the cornerstone of your recruitment plan. Do not go overboard on the amount or types of benefits you offer, either. If you do, you might end up having to deal with difficult questions, such as “When are volunteers no longer volunteers?” and “When is volunteering no longer an exchange?”

**Interviewing and Screening:**

The interview and screening process allow you to get to know the volunteer and begin to imagine how they can best contribute to your organization. Here are some pointers:

- Develop interview questions ahead of time, and perhaps develop a template to use so all staff are on the same page with how to conduct an interview.
- Talk with HR Director for suggestions; treat it just like an employment interview in terms of professionalism, appropriateness and focus.
- For screening, know that each volunteer can provide something useful if they are in alignment with the mission, so finding that right fit and suggesting a job that fits their skills and availability is important.
✓ Consider more than one volunteer for a long term, leadership role, and look at experience, skill set, communication skills and flexibility.

✓ Help them to be honest with themselves so they can commit to something they really want to do.

✓ Give them time to think about it.

✓ Propose the initial meeting to be informational so they can consider and get back to you or offer to follow up and see if it is a good fit.

✓ Provide job description for them to take home.

✓ If they have the experience, include them in the creation of the job description if it is new so they can feel buy in.

✓ If there is a job description or project outline (which takes it away from the person and focuses on the project) have them sign it. Explain this means they are committed to completing the project as long as their current situation stays the same.

✓ Ask them during the interview what other commitments they have that would take precedent, so if something comes up you would not be too surprised by their inability to continue.

Section II

Retention

Volunteers are people, so make sure you treat them right or they will go away! Retention requires consideration of who the volunteer is and why they are helping. Get the background story and make sure that what they are doing is in alignment with their goals. Like all people, volunteers need to feel
seen and heard so take note of what they do and what they say. Ask for feedback during and at the end of the process. Utilize your HR department to learn how to provide effective employee/volunteer development.  

*Make sure the opportunity matches their interest and availability.* Make sure you know what their interest and availability are or they will not show or get tired of being asked. Keep notes on what positions have higher retention and assess why that program is more or less effective than others. If working in one department has higher possibility of the volunteer staying, see what the staff is doing to acknowledge and keep the volunteer engaged. Here is a simple way to remember the different aspects of volunteer retention:
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| **Welcome Volunteer** | - Educate them on the agency and mission  
- Introduce them to staff and give tour |
| **Discuss Opportunity** | - Share what's open  
- Listen to what motivates them, their interest and availability |
| **Instruct and Collaborate** | - Show them the ropes and be available for questions  
- Be open to collaboration, they may have a better way to do things |
| **Supervise and Listen** | - Always be accessible, or have someone else who can be  
- Listen to their stories and perspective, by investing your time they become more invested in the agency |
| **Evaluate and Recognize** | - Always have an open door policy to receiving feedback, and at end of project, ask for it again  
- Recognize their efforts, applaud them for their contribution |
Evaluation

It is vital that you evaluate the work you are doing with volunteers as well as the work they are doing. Feedback is crucial to improving your organization as a whole as well as the volunteer program. At the end of an event, program or project, ask for feedback.

Sit down with the volunteer and ask them what worked well and what could have worked better.

If you are going to have an evaluation of the volunteer, make sure they know this in the beginning. Do not surprise them with a 6-month review because they are not committed like an employee, and they might leave because they do not want to hear critical feedback. Look at the entire experience through the lens that it was a project. Share with them what worked well and what could have worked better.

Make sure you have a process that you use for all volunteers across the board. Have group evaluations to assess a project or event outcome. This is great for committees. Have someone facilitate the discussion on what worked well and what could have worked better. Also, allow a column for what they are walking away with.

Lastly, if someone is facilitating the process and is the same person who led the group, make sure that person does not respond to each criticism. They need to write the feedback down. Moreover, that goes for all staff who asks volunteers for feedback. Do not respond or try to explain why something
happened. Just take note and consider later how you can adjust or learn from the experience.

**Dealing with Difficult Volunteers and Dismissal**

It is always awkward when you have a volunteer who is not keeping to the agreement made in the initial orientation and training. Because they are not an employee, there is not the standard HR method to handle the situation. Nevertheless, you can make one.

![Toolbox icon] Talk with your HR Director about how to create a procedure for working with volunteers that are not working well.

1. Make sure this is part of the volunteer handbook so they are not surprised.
2. The important thing to keep in mind when these situations arise is that it seems like it is not a good fit. That is it; just state “It doesn’t seem like this volunteer opportunity is the best match for you, let’s talk about that and see if we can find a better fit.”
3. Be willing to talk with them about it, and make it about the position rather than about the volunteer.
4. If they do not want such a confrontation, they will leave on their own accord, which communicates that it is not of vital importance for them to volunteer.
5. If they can talk with you privately, go over the initial volunteer job description they signed up for and explain how their actions are not matching the goals of the program.
6. If they are able to stay with you, brainstorm how they can have a position within the organization that matches their style, skills and availability.

7. It has been said that every person that believes in the organization’s mission can play a role in that organization.

8. It is hard to believe sometimes, but be creative. There might be something the volunteer can bring to the table in his or her own style that you will not find anywhere else.

10. Start over; ask about their passion, interests, skills and availability. Have the conversation.

11. If that does not seem fruitful, share your thoughts this is not the best match and recommend they try another organization.

12. Recommend places or refer them to the Volunteer Center for a free interview.

If it’s a really difficult case where there is inappropriate behavior, the volunteer is under the influence of alcohol or drugs, or they do something that goes against the code of conduct, bring in the HR Director and Program Director to confront the volunteer if necessary and explain that this isn’t the right place for them. At this point, you do not need to refer them anywhere because it is probably someone who needs help themselves and they probably are not able to serve others in the community at this point.

Record Keeping

In order to organize and manage volunteers, it is important to find a tool that you can input your volunteers into and have the proper information to refer
to. Whether it be simply using excel or some costly product, having a place where you house all of your volunteer information will make it easier for you to manage the volunteers and pass on your work to fellow employees.

There are many databases to choose from, Volunteer Hub, Volunteer Reporter, Filemaker, Rovir, etc. (See Appendix for Database Matrix).

Make sure to do an organization wide assessment when choosing database software. Have buy in from every employee that manages and uses volunteers so there are not different lists in each department.

Ask:

- **What do we need to record?** All facts, contact info, log hours, personal notes, birthday info, preferences, skills etc. Be sure to keep diligent records of the micro and macro level of impact the volunteer has on the agency and its community. Performance evaluation will also keep the agency and volunteer aware of improvements and areas for growth.

- **Why do we need that information?** Really, ask yourself what the data will be used for. Do you need it for grants? Program Evaluation? Board Retreats? PR? Capital Campaign?

- **Who will be gathering and inputting the data?** Create a clear workflow so everyone knows who is responsible for what. Have that be included in the job description along with instructions in case someone leaves the organization.
- **Who will be managing the data?** Updates always occur, so be clear on who is given permission to change data so there are no surprises. Volunteers are great resource for data management, but be sure they are treated like an employee handling valuable information and holding the knowhow on how to update information.

- **What kind of IT Support is available?** Sometimes, you have to pay the company to get updates and have technical support. Be realistic about who you will turn to when you have problems.

- **What is feasible?** Be realistic on cost, as there are always upgrades that will cost something annually. Look long term, and see what is best.

- **On the Cloud or on the Server?** On the Cloud, or viral, it is easier to access and does not take up space on your server. However, there is more of a chance for technical glitches that you cannot control depending on how many people are using the software online and what changes or issues the company providing the database is facing. On the server, it is more secure, so you know where your data is at all times. You can only access it through a computer that is hooked up to the server either onsite or by IT. The trend seems to be going on the cloud, but again, see what your organization needs.

Even if you are just using Excel, you still need to consider who does what and what goes into the database to ensure consistency.

There are some database software tools that allow a 60-day trial, or up to 100 volunteers so you can see what it’s like to use it. Before you try
something, answer the above questions and even consider having an outside facilitator lead the discussion and development of this assessment. In other words, take the time!

Be sure to keep records of all volunteers, and include personal notes so you can always be on a friendly manner with them. Note where they went for vacation, if they have pets, what their plans are for the winter. This will help with retention because they feel that you really care about them. Do not assume anything about volunteers, especially regarding financial donations! Just because they volunteer does not mean they want to donate, or even can. Volunteering may be the only way they can help because of financial difficulty. Never make an assumption about someone by the way they dress or act. Be aware of hints they may drop about where they are and what they want to do so they do not feel overwhelmed or bothered when you ask for something they cannot or will not do.

Section III

Recognition

“Recognition is not simply an event, gift or award, it is an ongoing process that must be inherent in all we do to attract, direct, inspire, retain and lead others” —Sue Vineyard—

Volunteers contribute their time and energy to help your organization run smoothly and successfully, and in order to keep those devoted, highly skilled and giving individuals as part of your organization, it’s vital that you take the time to acknowledge their hard work and contribution.
The following are points to remember when recognizing volunteers. As we all seem to remember acronyms easily, here is one for all volunteer coordinators to remember:

T—To keep them, you must thank them.

H—Hear them when they say they have comments or concerns.

A—Appreciate their individuality.

N—Notice their good work and comment on their specific achievements.

K—Keep it simple. It need not be a flashy gift. If it is sincere, it will be priceless.

Y—You must make yourself available. You must be visible.

O—Once is not enough. You must thank them every day.

U—Utilize them. Make sure there is meaningful work for them to do.

Generational Recognition Preferences

Retired and Boomer generations like acknowledgement in the form of networking opportunities, meeting fellow volunteers, board members and staff. Attempt to mingle the different sub groups of the organization: staff, volunteers, board members, clients (if possible).
People **ages 30-50** often times are so busy that volunteering is all they can do, let alone attend a recognition event. Here is where you want to acknowledge them in the moment. Leave candies or buttons out at the location they are volunteering. Include them in a bulletin as a highlighted volunteer. Invite them (and this goes for all ages) to write a story about their experience to put in the organization newsletter.

For younger generations, **ages 13-20**, provide recognition in the form of awards, letters of recommendations, references, job recommendations, job coaching, job shadowing etc. They are in the phase of finding out whom they are and what they want to do so supporting them this way while acknowledging their contribution will go farther than a pizza party. Again, provide little ways to say thank you throughout their volunteer experience.

Surprise them with a card signed by clients they worked with. Birthday cards are a great treat especially for the 55+ age group.

Volunteers like to see numbers, so show them how they are playing a part in the bigger picture. There are valid statistics and numbers on the value of volunteering. Research the financial gain you are getting from the volunteer and use that number to show your appreciation. Example: Display a big check that shows the total amount of money that it would have cost the organization to hire that volunteer or group of volunteers.
Summary

To conclude, volunteers are a great resource from the community, and it takes strong character to manage and appropriately engage volunteers in any organization. Using the three R’s -Recruitment, Retention and Recognition- will ensure that your organization has a thorough and effective volunteer program. Treat the volunteers as you would want to be treated, and even when things become overwhelming and resources are becoming more difficult to find, remember that volunteers are a source of energy, talent, skill and support that you must make a priority in order to truly serve the community.
Resource Appendix

Forms, Applications and Waivers

Tools Needed for Setting up an Effective Volunteer Program

- Volunteer Job description
- Volunteer Application
- Orientation Outline
- Volunteer Agreement
- Org Chart
- Budget
- Volunteer Coordinator Job Description
- Team Leader Volunteer Job Description
- Log

Media Sources

Contacts
Volunteer Job Description

Job Title:

Supervised By:

Position Summary:

Principle Duties and Responsibilities:

Minimum Requirements:

Knowledge, skills, and abilities required:

Volunteer Signature: __________________________   Date: ________

Organization Representative: ____________________   Date: ________
Volunteer Application

Name______________________________________________________________

Address____________________________________________________________

Home Phone (___)_________________ Cell Phone(____)_____________________

Email Address_____________________________________________ Date of Birth__/__/____

Availability:  Days _____  Evenings _____  Weekends ______

Education/ Special Training

Volunteer Experience

Ethnicity (Optional)  Caucasian __ Hispanic __ Native American/Alaskan Native __ Asian Pacific __ African American __ Other____________________________

Are you currently employed (Optional)  Full Time ____  Part Time ____

Employer: ____________________________  Address: __________________________

Special Accommodations or Limitations

Transportation:  Get Ride __  Bus __  Bike __  Walk __  Drive __  Other _____

How did you hear about us?  TV __ Radio __ Internet __ Word of Mouth __

Presentation __ School __  Faith Based Organization __ Volunteer Referral __

Do you have a preference (if any)________________________________________
Orientation Outline

I. Purpose of Organization

II. Introduction of the Volunteer Program and how it contributes to the Mission

III. The Different Ways They Can Volunteer

IV. What’s Expected of a Volunteer (Dress Code, Signing In, etc.)

V. The Logistics of Getting Signed Up

VI. Handouts: Volunteer Agreement, Policy Statement, and anything else they’ll need

VII. If possible, end with a tour and introduce to staff
Volunteer Guidelines

Thank you for your volunteer time and your contribution to our community.

The following guidelines are set up to help provide and fulfill our commitment to excellence.

- As a volunteer you are serving as an assistant under the direction of professional staff never as a substitute staff person
- You are expected to be reliable and prompt
- Be aware of your surroundings and keep them clean and safe
- Dress appropriately for example in an office setting wear office attire
- Communication is important feel free to discuss your ideas and also any concerns you might have
- Confidentiality is important. Please respect what you learn through your volunteer work
- Please keep a record of your hours

Volunteer First Name: ___________________ Last Name: ___________________

Volunteer Signature _____________________ Date _______

(Parent Signature if volunteer is under 18)
**Budget**

Basic allocations necessary for a fully developed volunteer program

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Volunteer Coordinator Job Description

General Job Description:
Primary: The Volunteer Manager supervises volunteers and provides direction, coordination, and consultation for all volunteer functions within the agency to: Strengthen public or private programs; involve a community of supporters as described in the duties outlined below.

Job Duties and Responsibilities (Other duties may be assigned as appropriate.)
- Develop, promote, and maintain a wide range of volunteer opportunities within the organization
- Survey staff regularly to assess needs for volunteer assistance
- Maintain Volunteer Service Descriptions for each volunteer assignment
- Ensure volunteers are staffed to support the various areas of operations, to include visitor service areas, exhibits and education, special events, development, and marketing/communications
- Recommend the most efficient use of volunteers, appropriate volunteer/supervisory mix, and future workforce needs to support volunteer program operations
- Conduct and/or arrange for volunteer orientation and training
- Schedule all volunteer activity
- Develop and manage volunteer policies, procedures, and standards of volunteer service
- Organize and participate in volunteer recognition programs and special events
- Evaluate all aspects of volunteer programs to ensure effectiveness and to recommend/implement changes as appropriate
- Maintain accurate records and provide timely statistical and activity reports on volunteer participation
- Recruit, interview and place applicants for volunteer work
- Host and attend recruiting events within the community to attract qualified candidates
- Work with Marketing and Public Relations and professional associations to publicize opportunities for volunteers
- Develop and maintain relationships with other volunteer organizations within the area
- Provide ongoing support and guidance for volunteers
- Confer with volunteers to resolve grievances and promote cooperation and interest
- Author monthly newsletter, “Volunteer View”
- Facilitate distribution of information relevant to volunteers
- Assist with other volunteer organizations established by other departments, including interns, volunteers, development volunteers
- Identify community outreach opportunities such as fairs, festivals, local markets and organizations
- Maintain schedule of opportunities
- Work proactively with staff to provide accurate information and assistance to the volunteer
- Develop and oversee program budget
- Remain current in general office technology
- Train volunteers to use office and specialized equipment when appropriate
- Send confirmation and reminders to scheduled volunteers

**Qualifications**
To be successful, an individual must be able to perform each job duty satisfactorily.

**Education and Experience**
- Possess a (level of education)
- Have job-related experience, such as managing volunteer programs, leading teams and/or organizations, (other?)
- Knowledge of management principles and evaluation techniques related to programs that involve a diverse group of volunteers

**Skills**
- Proficient in basic computer applications, such as word processing, spreadsheets, and Internet usage
- Record keeping skills (for admissions and marketing)
- Organization and planning skills

**Capabilities**
- Demonstrated capability to conduct one’s self in a calm and professional demeanor when dealing with the public and/or with difficult situations
- Demonstrated capability to effectively communicate orally and in writing
- Ability to work well with a diverse group of staff and volunteers
- Willingness to adjust hours to accommodate the needs of the job
- Ability to effectively manage a wide array of tasks, projects, and responsibilities
- Ability to work productively in an unstructured environment with frequent interruptions

**Time Commitments**
Hours are generally Tuesday through Saturday, between XX and XX
Must be available for special events and training
Team Leader Volunteer Job Description

Project Description:

The Opportunity/Job: Volunteer Leaders are important liaisons for the (agency and program). They support the Volunteer Coordinator with many aspects of the project. They assist with a variety of pieces throughout the project including but not limited to (Below is an example for one time opportunities):

- Be onsite the day of the project – arriving 30 minutes early to set up and stay to the end of the project to gather left over materials.
- Greet volunteers to the project, answer questions & direct them to the project site
- Make sure volunteers sign waiver & photo release
- Take photographs, hand out t-shirts and answer questions
- Provide an orientation to volunteers that covers the overall program purpose and safety
- The Volunteer Leader will support the school representative in supervising the volunteers

Time Commitment: up to 4 hours per project.

I have read and agree to the volunteer job description with the Volunteer Center of Sonoma County as outlined above.

Name (Print) _________________________________________

Signature________________________________________________ Date_______
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<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Time IN</th>
<th>Time OUT</th>
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Acknowledgements

Prepared By

Volunteer Center of Sonoma County

Volunteer Coordinator Handbook

Version One October 31, 2011

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Note   The content of a manual does not constitute nor should it be construed as a contract between Volunteer Center of Sonoma County and any of its employees.

Volunteer Center of Sonoma County at its option may change or delete parts of this manual at any time without prior notice.