

# Volunteer Management 101: Building a Solid Foundation



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**Arboretum**

UNIVERSITY OF WISCONSIN-MADISON

# Today's Key Learning Objectives

- ❖ Learn the key elements of effective volunteer engagement
- ❖ Understand the importance of planning
- ❖ Leave with resources for strengthening your organization's volunteer program

# Getting to know you...some questions

- ❖ Number of years of volunteer administration experience?
- ❖ What percentage of your job time is on volunteer administration?
- ❖ Is your organization all-volunteer, or mix of volunteer & paid staff?

**Planning**

Recognizing &  
Acknowledging

Advocacy

***Elements of  
Volunteer  
Engagement***

Documenting

Recruiting  
&  
Screening

Managing  
Performance  
& Impact

Orientation  
& Training

# Focus on Planning – big picture

## ❖ Know Your Organization

- Mission
- Vision – overall and for volunteer engagement
- Legal and Policy Parameters
- Culture
- Capacity
- Support
- Organizational Needs
- Framework for equity and inclusion

# Planning – Big Picture

Mission  
What? Why?

Parameters  
Laws &  
Policies

Support &  
Capacity  
Who?



## Chapter 1 Types of Unclassified Appointments

### 1.08 VOLUNTEERS

For liability purposes, anyone volunteering at UW-Madison must be given a letter—similar to an appointment letter—outlining the conditions of the relationship (see sample letter—[Attachment 1-A](#)).

Detailed information regarding appropriate responsibilities for volunteers, letters to volunteers, insurance issues and ID cards are detailed in the Fact Sheet ([Attachment 1-B](#)).

Volunteers need not be university retirees. However, the UW-Madison Retirement Association may of assistance in locating interested volunteers (phone 608-262-0641).

Questions about liability coverage for volunteers should be directed to the Director of Risk Management (262-8925). For other questions, contact the Academic Personnel Office (265-2257).

University of Wisconsin-Madison  
Unclassified Personnel Policies and Procedures—Ch. 1.08  
Feedback, questions, or accessibility issues: [apo@ohr.wisc.edu](mailto:apo@ohr.wisc.edu)  
Last updated March 18, 2008



**Any volunteers to share their organization's mission, or share law or policy affecting their organization?**

# Organizational Needs Assessment

- ❖ Work that you know needs doing
- ❖ Purposeful Networking – get ideas from other organizations
- ❖ Assess organizational capacity



A volunteer restoration team leader - getting the job done!

# Focus on Planning – details

- ❖ Job design
- ❖ Workspace, tools, equipment
- ❖ Supervision/leadership
- ❖ Develop orientation and training plans
- ❖ Policies & procedures in place
- ❖ Risk assessment, risk management







# Job Design

- ❖ Base volunteer jobs on real organizational need and capacity
- ❖ Consider need for supervision, training
- ❖ Think about motivations
- ❖ Create job descriptions

**Title:** Habitat Restoration Team Volunteer

**Supervisor:** Michael Hansen, Land Care Manager

**Objective:** Work with the land care staff to do ecological restoration at the Arboretum and its outlying properties.

**Responsibilities:**

- tree and brush removal from prairies and woodlands
- prescribed fire preparations
- pest plant management
- ecological monitoring

**Skills needed:**

- ability to work safely as part of a team
- ability to learn plant species
- ability to bend, kneel, squat, and to lift up to 30 pounds

**Training:** The supervisor will provide on-the-job training in plant identification, proper tool use, and safe work techniques.

**Schedule and Commitment:** Habitat Restoration Team volunteers can volunteer once a week or once a year. Work is weekdays, typically in 2 to 3 hours shifts between 8:00 a.m. and 3:00 p.m.

**Benefits:**

- knowledge of the Arboretum's flora and fauna
- understanding of restoration ecology
- satisfaction of enhancing our natural areas
- sense camaraderie from working with others
- practical experience for resume building

**For more information:** please contact Michael Hansen, Land Care Manager, at [mjhansen4@uwarb.wisc.edu](mailto:mjhansen4@uwarb.wisc.edu) or 608-225-3995.

# Risk Management



**What could possibly go wrong?**

## Questions to Ask:

- ❖ Who or what is at-risk?
- ❖ What are some low risk and high risk volunteer activities?
- ❖ What are policies and procedures that mitigate risk?

*From the Volunteer Management Training Series of the HandsOn Network, A Points of Light Enterprise.*

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# Advocacy

*A deliberate process with the objective of changing policy, procedures, actions, and/or behavior. Strives to influence (rather than coerce) others to change something.*

## Internal

Individual Volunteer

Volunteer Program

Volunteer  
Administrator Position

## External

Organization

Organization's Cause

Profession of  
Volunteer  
Administration

# Advocacy skills and steps:

- ❖ Become knowledgeable
- ❖ Prepare through research
- ❖ Develop and strengthen communication skills
- ❖ Build partnerships
- ❖ Develop and implement effective strategies & tactics
- ❖ Monitor progress
- ❖ Evaluate & adjust
- ❖ Celebrate success

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# Recruiting and Screening

- ❖ Tell a compelling story
- ❖ Reach desired audiences
- ❖ Advance equity and inclusion
- ❖ Reality checks – checking references, interviews, background checks
- ❖ Understand motivations
- ❖ Matchmaking
- ❖ Recruitment is a constant process
- ❖ Honesty is the best policy

# Some Recruiting Resources and Ideas

- ❖ [www.VolunteerWisconsin.org](http://www.VolunteerWisconsin.org)
- ❖ RSVP – Wisconsin listing:  
<https://www.dhs.wisconsin.gov/aging/volunteer/rsvplist.htm>
- ❖ High School and College volunteer fairs and service clubs
- ❖ Wisconsin Master Naturalist Program:  
<https://wimasternaturalist.org/>
- ❖ Professional Associations
- ❖ Local or regional fishing, boating, canoeing groups
- ❖ Media outlets
- ❖ Community, Civic, and Faith groups
- ❖ Word-of-mouth
- ❖ [www.volunteermatch.org](http://www.volunteermatch.org)

What are some pros and cons of word-of-mouth recruiting?



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# Orientation and Training

- ❖ Orientation: information about *the organization*
- ❖ Training: specific knowledge, skills, and attitudes to succeed in *specific role*
- ❖ Match training to duties
- ❖ Consider learning styles
- ❖ Conduct pre- and post-tests to check training effectiveness



How would burn crew training differ from receptionist training?  
How would it be similar?

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# Managing Performance & Impact

- ❖ Train staff
- ❖ Set objectives
- ❖ Monitor progress
- ❖ Supervise
- ❖ Offer & request feedback early and often
- ❖ Coach
- ❖ Behave with kindness
- ❖ Show respect



There is more to supervision than pointing and wearing a tie!

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## Documenting involvement and impact

- ❖ Think about what data you need to collect and retain, what not
- ❖ Confidentiality and privacy are crucial
- ❖ Can track all phases of “volunteer life-cycle”
- ❖ Gives us crucial information for assessing impact at many levels
- ❖ Assists with planning for future space, equipment, staff time, budget allocations
- ❖ Many tools available

## A CONSUMERS GUIDE TO SOFTWARE FOR VOLUNTEER MANAGEMENT

### QUICK LOOK/REFERENCE CHART

*In the next section of this report, you'll find detailed reviews of all the systems we looked at. In this section, however, you'll find a quick-reference chart to help you compare at a glance the different systems we reviewed. We rated the different categories of features on a three-point scale, and designated which systems include which features. We also indicated the categories in which each system excelled.*

	Standalone Systems			Consolidated Systems		
	eCoordinator/ eRecruiter	Volgistics	Volunteer Reporter	DonorPerfect	The Raiser's Edge(i)™	Volunteers for GiftWorks
Volunteer Profile	●	○	○	○	○	○
Activity Tracking	●	○	●	●	○	○
Scheduling Interface	●	●	○	○	○	●
Online Features	●	●	○	○	●	○
Email	●	○	○	●	●	○
Print Communication	○	○	●	●	●	●
Customization	●	○	○	●	○	○
Ease of Use	●	●	○	○	○	●
Manages Additional Constituent Info	○	○	○	●	●	●

○ Fair   ○ Good   ● Excellent

Published May 2011; URL in resource list





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# Acknowledgement and Recognition!

- ❖ Match recognition to volunteer and organization
- ❖ Be timely and varied
- ❖ Seek opportunities for community recognition in your area
- ❖ Recognition is a continuous process
- ❖ Well-planned volunteer program is fundamental element of effective retention and recognition



## *Remember:*

- ❖ Create and maintain good relationships
- ❖ Adjust input to expected output
- ❖ Plan, Act, Evaluate, Communicate, Adjust, Repeat



# Thank you

- ❖ Thanks to all of you for participating in this session.
- ❖ Thanks to UW Extension Lakes for inviting me to make this presentation.
- ❖ Thanks to my mentors and teachers over the years, who have helped me grow in this profession, particularly Sara Minkoff and Louise Goldstein, plus those who served on my professional association board with me long ago.
- ❖ Thanks to my colleagues at the UW-Madison Arboretum for your friendliness, professionalism, and support.
- ❖ Thanks to all those who volunteer with the UW-Madison Arboretum, who have taught me so much.

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