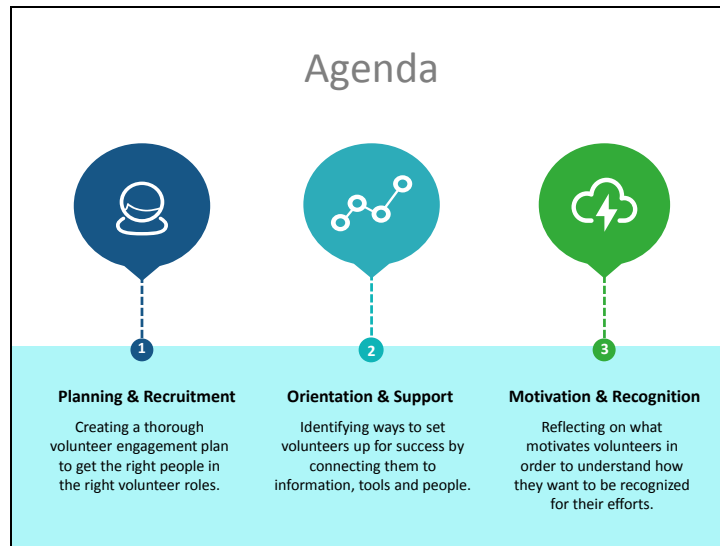


Slide 1



My name is Carol Neuman and I'm the Director of Learning at Vantage Point. Vantage Point is a not-for-profit organization that supports other not-for-profits by providing foundational, advanced, and online learning opportunities. We work with more than 500 organizations and nearly 3000 not-for-profit leaders across BC.

Today, I'll be your e-learning facilitator, sharing some best practices and tools engage volunteers in delivering your mission.

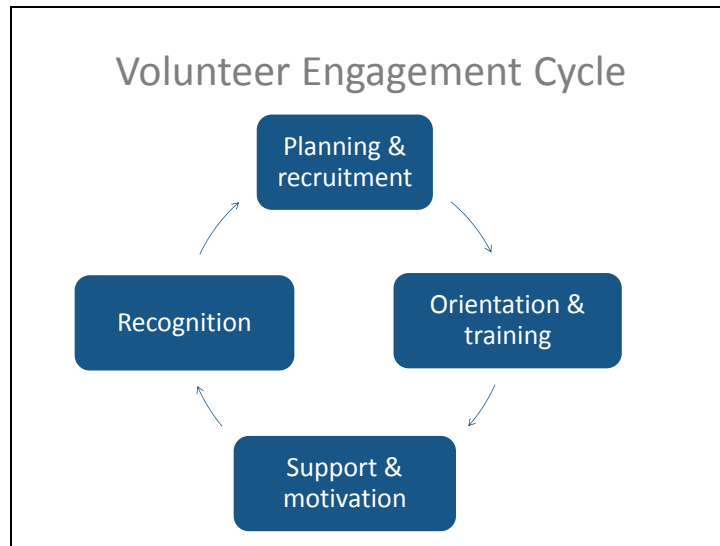


In this e-learning, we will continue to explore practices that support the successful engagement of volunteers.

First, we'll look at how planning and recruitment can support you to create a strong volunteer engagement plan, and get the right people in the right volunteer roles.

Then, we'll look at orientation and support. We'll talk about ways you can set your volunteers up for success by connecting them to the right information, tools and people. Finally, we'll close by exploring motivation and recognition and why're they're important parts of the volunteer engagement process.

Let's get started!



In case you didn't join us for Part 1 of this e-learning, here are the four stages in a successful volunteer engagement program.

It begins with a focus on planning and recruitment. How do you want the volunteer to contribute their time, skills and energy? What specific role or project will they take on? What would success look like in this volunteer role? Who would be a great fit for accomplishing the task at hand?

Then comes orientation and training. In this stage, you will support the volunteer by introducing them to the people, giving them the tools, and providing the information required for them to be successful in their role.

Then comes step three. As the volunteer becomes more comfortable in their role, you'll continue to provide them with support and motivation.

The final stage is recognizing the ways the volunteer has helped your organization deliver its mission.

In this Part 2 of this e-learning on Volunteer Engagement, we'll look at each of these four stages in more detail.

Creating a Project Plan

- 1. Describe what success looks like.**
 - Think about what you need done, how and when
 - Create a position description
- 2. Think about what tools the volunteer needs to fulfill their role.**
 - Desk space, email, internet access, or phone
 - Physical tools
 - Specific training or certifications
- 3. Plan their onboarding & orientation.**
 - Volunteer handbook, letter of agreement
 - Orientation to role and office/workspace
 - Training on role and organization
 - Ongoing support, feedback and evaluation

The volunteer engagement cycle starts with a clear focus on planning. So, it's a good idea to start by creating a project plan.

Spending time on this process might feel a little boring, but trust me – it's worth it! The more you can commit to thinking about how a new volunteer role can support your organization's goals, the more likely you and your volunteer are to be successful. There are really three steps to planning.

The first is to describe what success looks like. Think about what you need done, how it will be done and by when. Why do you require a volunteer? What will success look like for someone in the role? Then, take that information and use it to create a position description (we'll talk about that in more detail in a few moments).

Second, think about what the volunteer needs to fulfill their role. Will they need access to desk space, email, internet access, or phone? Are there any physical tools they'll need? Do you expect them to have any specific certification or training to do the role?

Third, think about training and orienting the new volunteer. For roles that require a lot of up-front investment of time, it may feel like it would be simply easier to do the job yourself. However, over the long-term, the payoff can be huge! Just be honest with yourself and your team about how much time will be required to meaningfully engage and support a new volunteer. You might want to involve other people in your organization in orientation and training process.

Determine who will be responsible for orientation and onboarding tasks like:

- Creating and sharing the volunteer handbook and letter of agreement;
- Orientation to role and office/workspace;
- Training on the specific role and your organization;
- Ongoing support, feedback and evaluation.

Once training is complete, you might decide that a specific staff person, board member or committee member is best suited to support your volunteer. Think about who the volunteer will connect with most frequently in their role.



A position description is a great way to set your volunteer and your organization up for success throughout the engagement cycle. A well thought out position description can support you with:

- Planning the training and orientation for the volunteer;
- Recruiting the right candidate; and
- Keeping your project on track.

Here's what you'll want to include in a position description:

- Title – brief name of the role
- Purpose of the role – this should be kept short but accurate. Focus on what the big picture goal is and show connection to mission.
- Responsibilities – this section is about the day to day or ongoing activities the volunteer will perform.
- Skills & experience – this might include education, professional and soft skills, or key characteristics. Spend some time thinking about what you really need vs what you would like to have.
- Time commitment – How and when will the volunteer perform the work? Is this role ongoing, or project-based? Is the volunteer expected to spend a specific number of hours per week in your office, working remotely, or something else? Be sure to be specific here.
- Benefits – This can be overlooked but it's important. And by benefits, we don't mean coffee or t-shirts. Often, the benefits are connected to your mission but also to motivation. A benefit might be the opportunity to work with a grassroots organization, working with the

fundraising professionals you have on staff, or enhancing specific skills, such communications and marketing skills.

I'll also mention that you can find examples of position descriptions on the Vantage Point website.

Letters of Agreement & Waivers

How they support your organization:

- Releases the organization, sponsors and partners from liability for injury or harm involved with the volunteer role
- Confirms that the volunteer has no expectations of payment
- Provides a way to obtain parental consent for volunteers under 19

How they support your volunteers:

- Provides clarity on what is expected from them and what is not allowed
- Details what personal information might be shared and how
- Helps them understand expectations and risks with the particular role, as volunteers are not covered by workers' compensation

How to create them:

- Determine which information is most important to include for the particular volunteer role
- Include a detailed job description
- Speak to a legal professional for specific advice

You'll want to have your volunteers sign a letter of agreement – which includes a waiver releasing you from liability – before you engage them in their role. The purpose of this is to create clarity – for you and for your volunteers – in a number of important areas.

Waivers and letters of agreement can support your organization to have strong volunteer engagement because they:

- Release your organization, sponsors and partners from liability for injury or harm involved with the volunteer role.
- Confirm that the volunteer has no expectations of payment and that they do not qualify for other regular employee benefits.
- Provide a way to obtain parental consent for volunteers under the age of 19.

For your volunteers, letters of agreement and waivers:

- Provide clarity on what is expected from them and what is not allowed when they volunteer with your organization. A waiver is used to ask the volunteer to accept the organization's bylaws, mission statement, or policies. These documents also should have their own acknowledgement statements (to document receipt and understanding). In the waiver, it is important to state that the volunteer assumes personal liability for acting against the bylaws, missions statement, or policies.
- Detail what personal information might be shared and how.

- Help them understand expectations and risks with the particular role. Waivers must advise of specific risks, such as by listing job duties. Given that many risks are not foreseeable, the waiver form also must reference general hazards. This is important because volunteers are not covered by workers' compensation. Your waiver should make this clear.

Here are some tips on how to create waivers and letters of agreement:

- Determine which information is most important to include for the particular volunteer role.
- Include a detailed job description. Waiver documents should be accompanied by or include detailed job descriptions. If the waiver form does not identify job duties, then the person is not in a position to accept the risks involved with the volunteer role. Role descriptions might include: physical requirements for the job. Examples might include the minimum weight one must be able to lift, emotional/mental difficulties that could arise from the position, descriptions of all activities the job will require, descriptions of the clientele this role will interact with, and descriptions of the locations and environments where work will occur.
- It's good practice to speak to a legal professional for specific advice on these matters.
- You can find an example of a volunteer letter of agreement – including a waiver – in the workbook that accompanies this e-learning.

Recruitment Ideas

<p> Word of Mouth</p> <ul style="list-style-type: none">• Make a presentation at a local service club• Ask other leaders or groups in your community to share information about your volunteer opportunities• Take part in a volunteer fair or open house• Encourage your existing volunteers or board members to suggest new people to reach out to	<p> Community Advertising</p> <ul style="list-style-type: none">• Put up posters at libraries, recreation centers or learning centers• List opportunities in your community newspaper <p> Online</p> <ul style="list-style-type: none">• Make sure you have volunteer information in your organizational website and newsletter• Share listings on Facebook• Post on other networking websites or community groups
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Once you have created a detailed position description and letter of agreement, you're ready to start recruiting for volunteers!

For many organizations, asking the same people to volunteer over and over again can be a challenge. But there are many techniques you could use to recruit new, high potential volunteers to your organization. Let's talk about some different avenues you might want to explore.

The first is word of mouth. Some ideas to reach out to new people this way could include:

- Making a presentation at a local service club,
- Asking other leaders or groups in your community to share information about your volunteer opportunities,
- Taking part in a volunteer fair or open house,
- Or, encouraging your existing volunteers or board members to suggest new people to reach out to.

Next is community advertising. Here, you might want to put up posters at local libraries, recreation centers or learning centers. And, you'll also want to consider placing volunteer opportunities in your community newspaper – many will post volunteer listings for free.

And, finally, don't forget about online recruitment opportunities. The key here is to make sure you have detailed volunteer information on your organization's website as many potential volunteers will want to learn about your organization and your volunteer roles before they

reach out to you. You can share volunteer positions in your newsletter, on Facebook, and in other networking websites or community groups. There are even volunteering-specific websites like GoVolunteer.ca where many volunteers will go to seek out volunteer opportunities.

Again, you don't have to rely on asking the same people you have always asked to volunteer. Be open to different types of volunteers and different ways of finding them. New volunteers are out there and eager to contribute to your organization!

Interviewing Volunteers

It's an opportunity...

- To see if there is a match between the volunteer's interest and skills and the volunteer opportunity.
- For you to understand the volunteer's goals and motivations.
- To make sure the role is of mutual benefit.
- For the volunteer to learn about your organization and culture, and meet people in your organization.
- To start building a relationship with the volunteer, set the tone for their engagement and put them at ease.

The next part of recruitment is interviewing. Now, you may be asking why you would want to bother with interviewing volunteers? The fact is, there are many reasons.

Interviewing is an opportunity:

- To see if there is a match between the volunteer's interest and skills and the volunteer opportunity.
- For you to understand the volunteer's goals and motivations.
- To make sure the role is of mutual benefit.
- For the volunteer to learn about your organization and culture, and to meet people in your organization.
- To start building a relationship with the volunteer, set the tone for their engagement, and put them at ease.

You'll want to begin the interview by explaining the purpose and format. Start by providing an overview of the organization, review the position description and further explain the role. Make sure you don't only talk about the role itself, but connect the work the volunteer would be doing to the cause or mission of your organization. From there, you can ask questions relevant to the role. Ask about their motivations to volunteer, strengths and goals.

Make sure you give the volunteer opportunities to ask questions, too. Ideally, an interview is a conversation. Finally, close the interview by thanking the volunteer for their time. Be sure to clearly explain the next steps, and tell them when and how will they hear from you.

THREE QUESTIONS to find the right fit for **YOUR VOLUNTEERS**

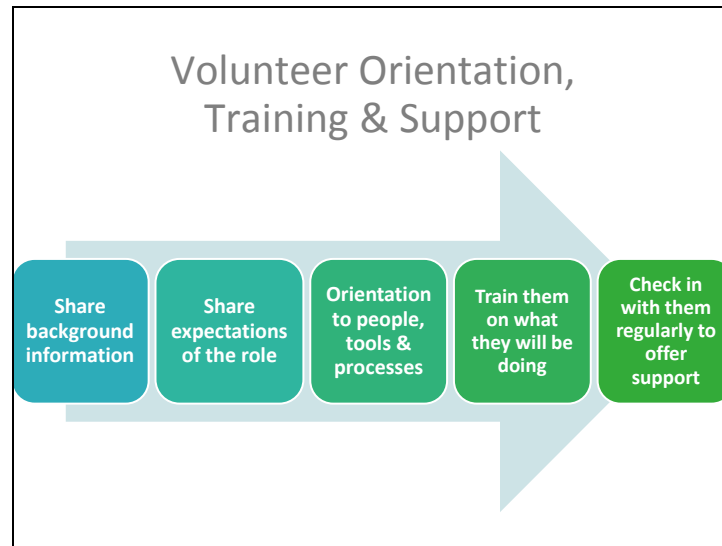
1. How much **time** do they have?
2. What specific **skills, experiences or talents** do they have?
3. Do they want to volunteer **on their own** or as part of a **group**?

Now, let's turn our attention to finding the right "fit" for a volunteer.

When you're interviewing a potential volunteer, there are many topics of conversation. But, there are really three basic questions that will get you on the right track when you're considering whether a potential volunteer is the right fit for a particular volunteer role and your organization:

- How much time do they have available to volunteer? What part of the day or week are they available? Does this line up with what you require from a particular volunteer role?
- What skills, experiences or talents do they have that they want to share? Are these skills similar to the ones you included in the position description? Are they willing to share them with you?
- Do they want to volunteer on their own or as part of a group? This may not seem like an obvious question, but it can have a significant impact on their satisfaction with their volunteer role. As we'll talk about a little later on, questions like these can reveal a lot about motivation, which is connected to how satisfied and successful a volunteer will be in their role.

These questions will help you in addressing "fit" for a wide variety of volunteer roles.



Once your volunteer has signed their letter of agreement or waiver, you're ready to start their orientation and training. There are five steps here.

- Share background information. This might include the mission and history of your organization, a history of the program and the culture of your organization – in other words, how you do what you do. What attitudes and behaviours are encouraged and which are discouraged? For someone new to an organization, this is not always self-evident. If you have a staff handbook, it may be applicable to share key information and explain your policies. For example, you may have a policy around pets, or not wearing scents to the workspace.
- Share expectations of the role. This is a great opportunity to review their position description again, and encourage the volunteer to ask specific questions. Again, highlight how their role fits with the bigger picture goals of the organization.
- Orientation to people, tools & processes. How will they work with others, like staff and volunteers? Who will they come to if they have an issue or a question? How will they use their tools required in the role – whether that is a software program, or physical equipment?
- Train them on what they will be doing. This might be through on-the-job learning, reading an orientation manual, or shadowing someone already in the role. You might want to think about breaking down training into a few smaller sessions and giving people time to practice what they learned before learning something new.
- Check in with them regularly to offer support. This might, from time to time, mean sharing feedback for improvement. Try to keep your feedback constructive, timely, positive and focused on the issue that needs to be affected, rather than the person. And, make sure you also provide informal feedback on how the process is going, including what's going right.

Volunteer Recognition

Recognition is not only acknowledging a job well done or saying *thank you* at the end of an engagement.

It starts with **literally recognizing volunteers for their talents** and that they are a **part of the team** working toward the organization's **mission and goals**. It is respecting all volunteers on a daily basis.

Now let's talk about the final step in the volunteer engagement cycle: recognition.

Recognition is not only acknowledging a job well done or saying *thank you* at the end of an engagement. It starts with literally recognizing volunteers for their talents and that they are a part of the team working toward the organization's mission and goals. It is respecting all volunteers on a daily basis.

So, I want to emphasize that volunteer recognition is key way of keeping volunteers motivated. It's important to remember that volunteer recognition is not an event or a task to be completed when a volunteer finishes their role. It's an ongoing process and part of supporting your volunteers!

I'll add that thanking, acknowledging, and appreciating your volunteers is not a one-person job either: all members of the organization who benefit from volunteer support, whether they are the board, staff or clients, can participate in volunteer recognition.

And remember, recognition is deeply personal. Individual volunteers might want to be recognized in very different ways!

Recognition Follows Motivation	
Motivations	Possible Recognition Activity
Personal growth	<ul style="list-style-type: none"> Write a piece for the organization's website to highlight them as a dedicated volunteer in their role.
Sense of belonging	<ul style="list-style-type: none"> Grant an award and present it in front of peers. Provide a certificate or card or benefit that signifies membership in your organization.
Career goals	<ul style="list-style-type: none"> Promote them to a new role with more challenging tasks and responsibility. Provide a recommendation letter signed by the Board of Directors or leadership staff person.
Involvement in the mission	<ul style="list-style-type: none"> Share concrete evidence of the results of the volunteer's contribution to your mission. Provide a letter direct from the clients who benefit from their volunteering.

Here's what I mean by this: the way that a volunteer wishes to be thanked and acknowledged is often connected to their motivation as well as their personality.

When I say motivation, I'm talking about the reason that the volunteer decided to become involved with your organization. As we explored in Part 1, there are many reasons a volunteer might want to share their time, talent and skills. You'll likely have discussed motivations during the interview stage of recruitment.

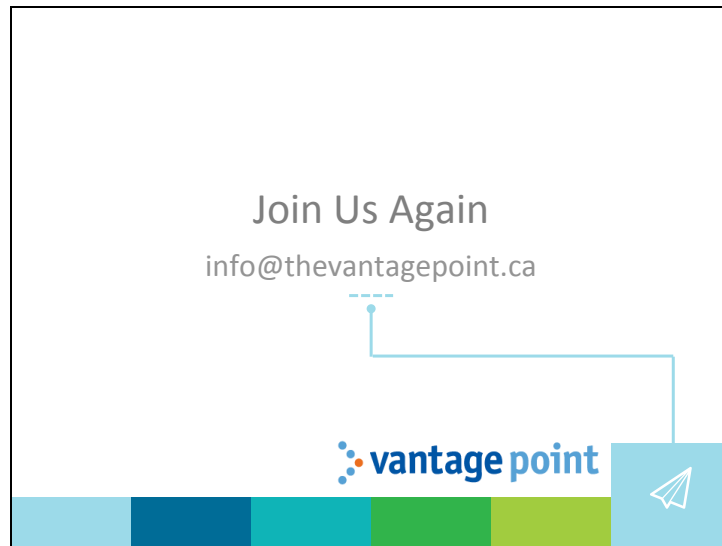
When you recognize your volunteers, think about who they are as people, how they would like to be recognized, and what their motivations are. For example, a volunteer who decided to become involved for a greater sense of belonging might want to receive an award in front of their peers or a card that shows their membership in your organization. A volunteer who is motivated by a desire to improve their skills might want to be thanked, and then offered a new role with more responsibility. Someone motivated by your mission might feel most appreciated when you share concrete, specific results of their involvement.

There are lots of ways to thank and acknowledge volunteers. Be creative. As you reflect on the many examples of recognition on screen, think about what might work in your organization. What stands out to you? What opportunities for improvement do you see in your organization? What do you feel your organization is doing really well?



Volunteer engagement is an ongoing process. It begins and ends with looking for the win-win: putting the right person in the right role for the right reasons.

By following the steps in the volunteer engagement cycle, and focusing on how, when, and who to engage in your volunteering programs, you can set your organization up for success.



Thank you for taking part in this e-learning session. We hope you join us again next time.