Great Volunteer Management System
About New York Cares

New York Cares is the largest volunteer network in the city. Last year, 52,000 New Yorkers made the city a better place by volunteering in New York Cares programs at 1,100 nonprofits and schools – improving education, meeting immediate needs, and revitalizing public spaces.

To learn more, visit newyorkcares.org.

About NYC Service

NYC Service, a division of the Mayor’s Office, launched in April 2009 in response to President Barack Obama’s national call for volunteerism and a goal of engaging 100 million Americans in service by 2020. New York City was the first “City of Service” and since NYC Service launched, over 200 U.S. cities have joined the Cities of Service network. Today, NYC Service builds partnerships to deepen and expand civic engagement through volunteer and service programs, creating sustainable change for our city’s greatest needs. Our Vision is to unite New Yorkers in service to advance lifelong civic engagement for a more equitable and inclusive city.

To learn more about NYC Service and access our opportunities, resources, and tools, visit nyc.gov/service.

Objectives

Volunteers are critical to the mission and success of nonprofits.

Volunteers engage community.

Volunteer management takes an investment of time and energy, and requires systems and processes to ensure volunteers are well supervised and used strategically.

This volunteer management system guide will support the design of a framework of your volunteer program. We present a number of volunteer management topics, each with a brief overview that helps define it and illustrate why it is important. Each overview is followed by examples of best practices culled from a variety of sources and organizations. Some sections include tips or websites for further exploration. Each topic is accompanied by a variety of tools, worksheets, examples, and resources designed to help you improve your organization’s volunteer management.
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Great volunteer management occurs when it is a critical part of an organization's strategic plan. The best volunteer programs engage volunteers as a priority. Share your strategic plan with your volunteers. Knowing your organization's mission, vision, current priorities, and goals will give volunteers an incentive to buy-in to your work, commit, and return to volunteer.

Ensure support for volunteer programs from Executive Leadership, including your Board of Directors, and look for strategic ways to build capacity with your volunteers. Work within all levels of your organization to formalize the role of volunteers by specifically including volunteers in strategic plans, program goals, and by creating specific roles for volunteers. Reimagine your strategic plan and goals, and create clear and specific roles for volunteers. Volunteers are cost-effective, but require investment. Investing in volunteers as a resource can ensure they are used strategically.

**Best Practices:**

- Create your organization's strategic plan with volunteers as a critical goal and strategy (use Worksheet 1 as a starting point).
- Establish volunteer service as a goal within the organization's strategic plan and annual objectives.
- Engage all staff, from custodial to Executive Leadership, in conceptualizing how volunteers could support and advance their work. This creates a culture shift and allows all staff to see how volunteers can help expand your reach as opposed to being a task or chore.
- Designate one or more staff members to coordinate volunteers.
- Include volunteers on your organizational chart to show their reporting structure and importance.
- Share your mission and goals with volunteers early and often.
- Put volunteers' work into context (e.g. let them know how long it would have taken paid staff to do the same task).
- Provide impactful statements and statistics that demonstrate how volunteers support your work.
- Recognize staff who work with volunteers by including them as part of their review process and on-going management.
- Share successful use of volunteers to other staff members to make them aware of ways that volunteers being used efficiently and effectively at your organization.

**TIP:**

The estimated value of a volunteer's time is $26.45 per hour in New York and $22.55 per hour nationally. (2013 independentsector.org)
Topic 1: Engaging Volunteers Strategically in Your Organization

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The estimated value of a volunteer’s time is $26.45 per hour in New York and $22.55 per hour nationally. (2013 independentsector.org)
Worksheet 1: Develop a Strategic Plan with Volunteer Service as a Critical Goal and Strategy

Use this strategic plan outline to analyze your organization’s mission, purpose, and objectives as they relate to volunteers. Each component should inform each other. Internal and external assessment of your work should inform your planning, your activities, and how you measure your work.
Worksheet 2: Volunteer Management Reflection Worksheet

Answer the following questions to get to know your current volunteer program and identify areas for improvement.

Is there something unique you have done to help attract or retain volunteers at your organization?

What do you see as one of the major challenges to your organization’s current volunteer management structure, or to your own work in managing volunteers?

Is there a larger barrier (internal or external) that you or your organization faces when it comes to improving volunteer management practices or systems?

What skills and practices would you like to work on that relate to your management of volunteers?

What can your organization as a whole do to better support new and current volunteers?
Worksheet 3: Engaging Staff from Outside the Volunteer Management Team in Defining Volunteer Roles

Answer the following questions to get to know your current volunteer program and start to identify areas for improvement.

Are there aspects of your organization's volunteer support system that you would like to improve (e.g., feedback structure, policies, and procedures, etc.)? Identify 1-2.

Who else from your organization will you engage in the volunteer support system? Identify 1-3 staff.

What next steps do you need to take to incorporate and streamline the task of supporting volunteers across staff in your organization?
Topic 2: Using Volunteer Position Descriptions

Volunteers and staff benefit from clear position descriptions that detail expectations for volunteers and for those who are supervising volunteers. Like job descriptions, good volunteer position descriptions clearly outline responsibilities and expectations. Done well, they are critical tools for training, as well as for providing feedback to volunteers both during and after assignments.

Position descriptions should be written and shared and should include details such as duration of the project; time commitment; necessary skills, training, or languages; and other particulars specific to your organization and the volunteer role. When you have determined the ideal roles for volunteers at your organization, you will also need to decide what kind of volunteer commitment best fits each position. Volunteers can be one-time, episodic, semi-committed, very-committed, or nearly full-time, as in the case of interns or AmeriCorps members. If it supports your mission and programs, it’s helpful to have a variety of short- and long-term volunteer positions available to engage a diverse mix of volunteers.

Best Practices:

• Engage staff who will be working with volunteers in creating volunteer position descriptions so they feel comfortable training and providing feedback to volunteers.

• After volunteers have completed an assignment, ask them if the project fits their expectations and revise the position description as needed; volunteers are more likely to return if their expectations are met, even if the assignment is difficult.

• Create action-oriented descriptions that lead with verbs to get volunteers excited. Include specific project details and impact to keep volunteers’ attention.

• Ensure that volunteers know how they will receive evaluation and feedback and understand they are valued members of the organization.

• If you are interviewing for a very-committed, full-time, or leadership volunteer, have a staff person conduct a prescreening either by phone or in-person, to review position descriptions and other critical information.
Worksheet 1: Volunteer Gap Analysis Worksheet

Use the worksheets on the following pages to help you think about the volunteer roles you need to develop or refine at your organization.

First, you will focus on the gaps between the volunteer positions your organization currently has, and the volunteer positions your organization wants to create. This will help you identify some of the volunteer roles that are missing from your menu of volunteer opportunities.

Next, you will have a chance to align the volunteer roles you hope to develop or refine with your current organizational priorities and goals. Connecting volunteer roles to your strategic goals and priorities will help shed light on which volunteer positions your organization should focus on developing first.
## Worksheet 1: Volunteer Gap Analysis Worksheet

### I. Volunteer Role Gap

**Note:** Use information gathered from your organization and colleagues to help you determine the new volunteer roles you want to develop. See examples in italics below.

<table>
<thead>
<tr>
<th>Identified Need in Organization (based on your own assessment and colleague’s input)</th>
<th>Is there a current volunteer role that can help address the identified need? If so, which role?</th>
<th>Roles to develop or refine in order to address identified need</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classroom management</td>
<td>Yes, “student buddies”</td>
<td></td>
</tr>
<tr>
<td>Classroom content is out of date</td>
<td>No</td>
<td>Add curriculum developer role</td>
</tr>
</tbody>
</table>

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
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<td></td>
</tr>
</tbody>
</table>
II. Aligning Volunteer Roles with Mission and Strategic Goals

Connect proposed volunteer roles to your organization's mission and strategic goals. See examples in italics below.

<table>
<thead>
<tr>
<th>Volunteer role to develop or refine (based on your own assessment and colleague input)</th>
<th>With what organizational goals or priorities does this volunteer role align (if any)?</th>
<th>How does the role or task align with your mission or an organizational goal/priority?</th>
</tr>
</thead>
<tbody>
<tr>
<td>E.g. Curriculum Developer</td>
<td>Provide program-rich environments in youth clubs</td>
<td>Develops issue area content for use in youth clubs</td>
</tr>
</tbody>
</table>

|                                                                                      |                                                                                   |
|                                                                                      |                                                                                   |
|                                                                                      |                                                                                   |
|                                                                                      |                                                                                   |
|                                                                                      |                                                                                   |
Worksheet 2: Volunteer Position Description Worksheet

The volunteer position description outlines the responsibilities and benefits of specific volunteer opportunities, and identifies what support or training the organization will provide. A well-thought-out description helps strengthen recruitment efforts because it defines the assignment and details the skills, abilities, and interests integral to performing the task successfully.

A volunteer position description should include the following components:

**Title**
Provide a short, descriptive title that gives the volunteer a sense of identity. This will also help program staff and other volunteers understand the assigned role.

**Purpose/Objective**
Use no more than two sentences to describe the specific purpose of the position. If possible, state the purpose in relation to the nonprofit’s mission and goals.

**Location**
Describe where the person will be working.

**Key Responsibilities**
List the position’s major responsibilities. Clearly define what the volunteer is expected to do as part of this assignment.

**Qualifications**
Clearly list education, experience, knowledge, skills, and age requirements. Also note if the opportunity is accessible to people with disabilities. If a background check is required, it should be indicated here.

**Time Commitment**
Note the duration of the assignment, hours per week, and/or other special time requirements.

**Training/Support Provided**
Define the nature and length of all general and position-specific training required for the assignment. Also list resources and other support available to the volunteer.

**Benefits**
Describe benefits available to the volunteer, such as lunch, a T-shirt, and personal development opportunities.

**Volunteer Supervisor and Contact Information**
List the staff person or volunteer leader who will be working most directly with the volunteer. Share how and when the volunteer will be evaluated and provide supervisor contact information.
**Worksheet 2: Volunteer Position Description Worksheet**

Use this worksheet to outline the responsibilities and benefits of specific volunteer opportunities, and to identify what support or training the organization will provide the volunteer. Remember to be as detailed as possible and to use clear language—no jargon or acronyms that new volunteers may not understand.

| **Title:** |  |
| **Purpose/Objective:** |  |
| **Location:** |  |
| **Key Responsibilities:** |  |
| **Qualifications:** |  |
| **Time Commitment:** |  |
| **Training/Support Provided:** |  |
| **Benefits:** |  |
| **Volunteer Supervisor:** |  |
| **Phone:** |  |
| **Email:** |  |
| **Program Website:** |  |

This form is modified from The Points of Light and the HandsOn Network.
Worksheet 3: Creating a Volunteer Listing

Use this worksheet to craft a volunteer description. This information could be used in an email or even a volunteer database site, such as nyc.gov/service, to recruit people for positions. Though it’s good to keep your description lighthearted and accessible, the key qualifications and availability requirement information from the previous pages should be prominently featured in your messaging. Consider who might be happy or qualified for this role other than a professional.

Use the space below to draft your own listing.

**Headline**
WANTED: Shower Singers, Karaoke Artists, Professionals, and Everyone in Between with a Love for Singing!

**Text**
Work with choral students, grades three through five, by sitting throughout the group and keeping everyone focused on learning two- or three-part songs. While no experience is required, we are looking for a piano accompanist. Position is twice monthly through June.

<table>
<thead>
<tr>
<th>Headline</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Text</strong></td>
</tr>
<tr>
<td>Work with choral students, grades three through five, by sitting throughout the group and keeping everyone focused on learning two- or three-part songs. While no experience is required, we are looking for a piano accompanist. Position is twice monthly through June.</td>
</tr>
</tbody>
</table>
**Worksheet 4: Developing a Project Plan**

Create your own project plan for volunteers so that they know what is expected of them.

Use Table 1 to enter what volunteers will be doing, and use the calendar boxes to the right to check off the month they will work on or complete this task.

Use Table 2 to create specific goals and deliverables for each volunteer. Be sure to include deadlines and benchmarks so you know the project is on-schedule or completed.

<table>
<thead>
<tr>
<th>Organization Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Name:</td>
</tr>
<tr>
<td>Number of volunteers assigned to project:</td>
</tr>
</tbody>
</table>

**TABLE 1: Project Plan**

<table>
<thead>
<tr>
<th>Essential Functions and Specific Tasks</th>
<th>S</th>
<th>O</th>
<th>N</th>
<th>D</th>
<th>J</th>
<th>F</th>
<th>M</th>
<th>A</th>
<th>M</th>
<th>J</th>
<th>JU</th>
<th>A</th>
</tr>
</thead>
</table>

**TABLE 2: Goals and Deliverables**

<table>
<thead>
<tr>
<th>Goal</th>
<th>Benchmark/Deliverable</th>
<th>Date</th>
<th>Benchmark/Deliverable</th>
<th>Date</th>
<th>Benchmark/Deliverable</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Topic 3: Tailoring Volunteer Recruitment and Messaging

With many other organizations, interests, and hobbies competing for people’s free time, it is critical to develop a recruitment plan that is targeted to your ideal volunteer populations. Simply posting information on your website and hoping that volunteers will come to you is unlikely to generate interest in today’s crowded communications landscape.

Once you have developed your volunteer position descriptions, use them to think about ideal availability or skills you will need, and begin to design your recruitment plan using those as a guide. For example, many adults are not available during 9 a.m. to 5 p.m., but college students and older adults often do have free time during the day. Specific skill sets, whether language fluency or construction skills, may guide your recruitment efforts toward particular affinity groups or trade unions. Be sure to vary and test recruitment strategies, and ask volunteers how they found out about your organization so you can measure what works best. Remember to mention the benefits of volunteering, such as gaining new skills and making new connections, as you craft your recruitment messaging.

Best Practices:

• A key reason people volunteer is because they are asked. Make sure your recruitment message has a clear ask and description of what you would like volunteers to do. Never be vague!

• If you are targeting specific skill sets, make sure to include them in your messaging. Volunteers who speak another language or have a specific skill will likely be excited to engage. Blanket messages are rarely effective.

• Use a range of recruitment tools, including your website; social media like Facebook and Twitter; direct outreach like mailings, email, and phone calls; and indirect outreach and public relations like news articles, word of mouth, and other websites. Organizations like nyc.gov/service, idealist.org, and New York Cares are often great places to list and post volunteer opportunities.

• Think broadly about who can be a volunteer. If you serve students or clients, they themselves, as well as their families, are a great starting point for recruitment.

• Share the benefits of volunteering in your outreach messages. This will help you to recruit volunteers.

• Since seniors represent a large potential pool of volunteers, it is crucial that volunteer recruitment and messaging be targeted to the group. To successfully recruit older adult volunteers, consider:
  • Utilize traditional methods of communication, including telephone, postal mail, or print advertisements. While many older adults use email and internet platforms, some prefer these forms of communication.

TIP:

In-person asks are highly effective. Don’t forget to ask your already-dedicated volunteers to help with recruitment.

More information about the benefits of volunteering can be found at nationalservice.gov.
Topic 3: Tailoring Volunteer Recruitment and Messaging

- Recruit in the context of organizations where older adults are likely to be actively involved, including fraternal organization, religious institutions, or civic groups.
- Be consistent in messaging that you are interested in the skills and talents that older adults offer as volunteers. Include pictures of older adult volunteers in promotional materials, and describe their volunteer impact to showcase their contributions.
Worksheet 1: Volunteer Recruitment Strategy Worksheet

Develop a volunteer recruitment strategy for at least two of your organizations' volunteer positions.

<table>
<thead>
<tr>
<th>Volunteer Role</th>
<th>Target Audience(s)</th>
<th>Recruitment Tactic</th>
<th>Frequency</th>
<th>Cost/Time</th>
<th>Person/Dept. Responsible for Implementing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>
**Worksheet 2: Volunteer Recruitment Messaging Worksheet**

Take some time to work through the elements that should be included in your messaging for a specific volunteer position at your organization.

<table>
<thead>
<tr>
<th>Volunteer position:</th>
</tr>
</thead>
<tbody>
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<td></td>
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</table>

<table>
<thead>
<tr>
<th>Organization:</th>
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</table>

<table>
<thead>
<tr>
<th>Duration and schedule:</th>
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</table>

<table>
<thead>
<tr>
<th>Target audience:</th>
</tr>
</thead>
<tbody>
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<td></td>
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</table>

<table>
<thead>
<tr>
<th>Need that the position addresses:</th>
</tr>
</thead>
<tbody>
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<td></td>
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</table>

<table>
<thead>
<tr>
<th>Why your audience should care:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Benefits to volunteer, organization, and community:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>How volunteers can get involved:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact information:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>
A clear and official on-boarding process for volunteers is a crucial and often overlooked facet of good volunteer management. It is critical to maintaining the safety of staff and clients, setting expectations for volunteers, and educating volunteers about your organization. Your on-boarding process should be unique to your organization, but should at a minimum include a volunteer application or intake form and an interview or orientation.

If this is your first time setting up a volunteer program, it is wise to check in with your Human Resources team or a lawyer to help define policies and procedures that are important to your site and clients. Once you have identified key policies and procedures to which volunteers must adhere, you can determine what kind of tracking system, intake forms, and screening processes will best fit your needs and the commitment level of your volunteers. If you are planning to use a background check to screen volunteers, we recommend Go Pass. The Go Pass initiative, a partnership with the Department of Education and NYC Service, offers nonprofits a simple and reliable volunteer screening process that helps reduce costs and enhance safety and security.

**Best Practices:**

- Have a volunteer application or intake form that is easy to find and complete, whether online or in paper form.
- Have clear policies and procedures and share them so volunteers are prepared from the start. These should be delivered in writing via email, website, or paper.
- Determine and enforce a screening process for volunteers. Your organization should have one voice when it comes to determining who can and cannot volunteer.
- Be sure your policies and procedures are up to date and legally compliant with all laws. For example, *The New York Nonprofit Revitalization Act of 2013* may require your volunteers be notified of your organizations whistleblower policy.
- Make sure your on-boarding process is commensurate with the commitment level of your volunteers. If you use one-time volunteers, a background check is probably not cost effective.
- Make sure that all volunteers have an orientation that gives them an opportunity to learn about your organization.
- Consider an interview for longer-term volunteers and volunteer leaders so you can gauge and match their interests.
- Ensure clients and staff can easily identify volunteers by using nametags.
- Encourage volunteers to have written personal development goals and desired outcomes for their volunteer experience.

**TIP:**

Google Forms is a great online tool for organizations that lack a budget for complex online forms or databases.

Visit [nycgopass.org](http://nycgopass.org) for information on background screening.
## Worksheet 1: Intake Process

All of my organization’s prospective volunteers…

<table>
<thead>
<tr>
<th></th>
<th>Check all that apply:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fill out an application and receive a response within two days</td>
<td></td>
</tr>
<tr>
<td>Submit resumes and/or cover letters</td>
<td></td>
</tr>
<tr>
<td>Have an in-person interview</td>
<td></td>
</tr>
<tr>
<td>Tell us their interests and skills</td>
<td></td>
</tr>
<tr>
<td>Receive a copy of our policies and procedures or a set of ground rules</td>
<td></td>
</tr>
<tr>
<td>Sign a volunteer agreement</td>
<td></td>
</tr>
<tr>
<td>Go through a third-party background check</td>
<td></td>
</tr>
<tr>
<td>Receive volunteer positions based on the skills and interests they express</td>
<td></td>
</tr>
</tbody>
</table>

Add additional steps to your intake process below

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18 | Topic 4: Creating an Official On-Boarding Process
Worksheet 2: Sample Volunteer Application

Volunteer Information Form

The information you provide on this sheet enables us to send you important volunteer information and other correspondence and assists us in helping you find suitable projects. Please fill out this form in its entirety. All items with ▶ MUST be completed.

PERSONAL INFORMATION (REQUIRED)  PLEASE PRINT LEGIBLY

First Name  Middle Initial  Last Name

This is a: □ Home Address  □ Business Address

Company Name (if this is a business Address)

Preferred  Ext.

Secondary  Ext.

Street  Apt.

City/State/Zip

E-mail – Please clearly print your preferred e-mail address.

MAILING PREFERENCES

I would like to receive:

□ The Calendar e-mail: a monthly guide to projects and events
□ The Program Guide: an annual printed guide to our projects
□ The Hot Projects e-mail: a weekly guide to projects that need volunteers
□ From time to time, New York Cares will send you information about our Happy Hours and other Fundraising events. If you DO NOT wish to receive these emails, please check this box

VOLUNTEER INTERESTS (PLEASE CHECK ALL THAT APPLY)

□ Adult Education/ Job Readiness  □ Children’s Sports  □ Financial Literacy  □ SAT Prep
□ Adults and Children with Special Needs  □ Computer Tutorials  □ Hunger  □ Seniors
□ Animal Care  □ Environment (Parks and Community Gardens)  □ New York Cares Office and Event Support  □ Support for People Living with HIV/AIDS
□ Children’s Arts  □ English for Speakers of Other Languages  □ Painting  □ Instructive/Certification (Please Specify)
□ Children’s Education  □ Performing Arts (please specify)  □ Photography  □ Other (please specify)

SKILLS (PLEASE CHECK ALL THAT APPLY)

□ Administrative/Office  □ Finance  □ Financial Literacy  □ Instructor/Certification (Please Specify)
□ Arts & Crafts  □ Gardening  □ Hunger  □ Office Work
□ Computers/Technology  □ Mural/Fine Art  □ New York Cares Office and Event Support  □ Asking my company for financial Contributions
□ Construction/Carpentry  □ Painting  □ Painting, Sorting, and Revitalization  □ Teaching/Tutoring
□ Curriculum Design  □ Performing Arts (please specify)  □ Photography  □ Video/Film
□ Desktop Publishing/Graphic Design  □ Performing Arts (please specify)  □ Writing

What Language(s) Do You Speak?

PLEAS CONTACT ME ABOUT: (PLEASE CHECK ALL THAT APPLY)

□ Annual Events Planning  □ Speakers Bureau  □ Becoming a Site Captain  □ Asking my company for in-kind gifts (please specify)
□ Fundraiser Event Planning  □ Office Work  □ Becoming a Team Leader  □ Asking my company for financial Contributions
□ Emergency Response Volunteering  □ Becoming a Team Leader  □ Becoming a Team Leader

PLEASE FILL OUT THE ADDITIONAL INFORMATION ON BACK

Orientation Date:
Entered:
Initials:

Office Use Only

11/09
Worksheet 2: Sample Volunteer Application

MY GENERAL AVAILABILITY IS: (PLEASE CHECK ALL THAT APPLY)
☐ Weekday Pre-9 a.m.  ☐ Weekday 9 a.m. – 12 p.m.  ☐ Weekday 12 p.m. – 6 p.m.  ☐ Weekday Eve. 6 p.m. – 9 p.m.  ☐ Saturday  ☐ Sunday

I LEARNED ABOUT NEW YORK CARES THROUGH:
☐ Friend  ☐ Media  ☐ Volunteer Event  ☐ Employer  ☐ Internet  ☐ Flier  ☐ Street Fair  ☐ Celebrity Ad  ☐ Other  

DEMOGRAPHIC INFORMATION (OPTIONAL)
New York Cares is dedicated to developing a volunteer base as diverse as the city we serve. Please help us chart our progress by providing the following:

Date of Birth: ___/___/____ (Please note: All New York Cares Volunteers must be 18 years of age or older)

Race/Ethnicity: ☐ Hispanic/Latino  ☐ White  ☐ American Indian/Native American  ☐ Black/African American  ☐ Asian  ☐ Hawaiian/Pacific Islander  ☐ Other

Age Range: ☐ 18-24  ☐ 25-34  ☐ 35-44  ☐ 45-54  ☐ 55-59  ☐ 60+

LEGAL INFORMATION (REQUIRED)
New York Cares organizes many volunteer programs serving children. Because we work with a variety of childcare agencies, some of which are government-regulated, we must ask you to provide the following information. Please respond even if you do not anticipate volunteering with children at the present time. Thank you for your cooperation.

DECLARATION OF CONVICTIONS OR PENDING CRIMINAL ACTIONS
List below any convictions for violations of law (other than traffic violations) in this state or elsewhere, and all charges currently pending anywhere. If you do not have any convictions, the “NONE” box must be checked. If the box is not checked, your form will be returned to you.

☐ NONE

Date of Conviction  Offense  Court & Location  Disposition & Penalty

CHILD ABUSE AND MALTREATMENT BACKGROUND INFORMATION
1. Are you the subject of an indicated child abuse and maltreatment report filed with the New York Central Registry of Child Abuse and Maltreatment (SRC) or elsewhere?
   ☐ NO  ☐ YES
   If yes, please provide date(s), description(s) and explanation(s) of incident(s).

2. Have you ever been terminated, suspended, placed on probation, reprimanded or otherwise penalized by an employer for child abuse and/or maltreatment in New York State or elsewhere?
   ☐ NO  ☐ YES
   If yes, please provide date(s), description(s) and explanation(s) of incident(s).

REFERENCES (PLEASE LIST TWO PERSONAL OR PROFESSIONAL REFERENCES)

<table>
<thead>
<tr>
<th>Name</th>
<th>Address (or email address)</th>
<th>Phone</th>
<th>Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

WAVER
I have read and understand the Volunteer Policies and Procedures of New York Cares. By signing below, I agree to the following: I attest that I am physically fit and prepared to volunteer. In consideration of my acceptance as a volunteer, I hereby agree to release, defend, indemnify and hold harmless New York Cares, Inc. and its affiliates and sponsors and their officers, directors, employees, representatives and agents, from any and all claims for expenses, personal injury, losses or damages that may be incurred or caused by me during or in connection with my volunteering, whether arising from the negligence of such persons or otherwise. I understand that when I am volunteering through New York Cares, I will be under the supervision and control of a New York Cares Project Partner. I understand that I will not be under the supervision and control of New York Cares, Inc. I grant full permission for organizers to use photographs, portraits, films and videos of me and quotations made by me in legitimate accounts and promotions of this event and New York Cares, Inc. I understand that New York Cares, Inc. reserves the right to collect additional information about me in the future as deemed necessary.

☐ Signature  Date

DECLARATION
I declare that all of the statements made on this form are accurate and complete to the best of my knowledge.

☐ Signature  Date
Worksheet 3: Agenda for a 60 to 90 Minute Orientation

This can be scaled back for one-time or episodic volunteers.

**Welcome and Introduction (10 - 15 minutes)**
Use this time to welcome new and/or potential volunteers to the program. Have participants and staff self-introduce, or implement an “ice breaker” by pairing volunteers with each other (or with staff or seasoned volunteers) and having them introduce each other.

**Program History and Mission (10 - 15 minutes)**
If you want your volunteers to feel engaged, it is critical that you help them understand your organization's program history, mission, and philosophy. If the history is lengthy, concentrate on highlights and supplement with timeline handout. If a video is available, this is the time to show it!

**The Importance of the Agency’s Volunteer Service to the Community (10 - 15 minutes)**
Success stories (preferably provided by volunteers) and an overview of opportunities will give new and potential volunteers an understanding of the program’s impact and the significant difference they can make.

**Expectations (10 minutes)**
This information is crucial and needs to be presented in a clear and straightforward manner. Include a discussion about how volunteers will be evaluated and about volunteer responsibilities. Reference your Volunteer Handbook and review bullet points of prohibited behaviors and consequences.

Volunteers need to know that your organization values their commitment and will provide support and ongoing training opportunities as needed. Review your agency’s grievance process and Volunteer Agreement. Mention the benefits of volunteering here as well.

**Next Steps for the Volunteer Placement Process and Questions (5 - 10 minutes)**
For potential volunteers who have not yet completed an application or interview, distribute applications, and explain the process. For others, explain the next step to placement.

Adjourn for refreshments and informal discussion among new volunteers, seasoned volunteers, and staff. Or, consider having experienced volunteers perform a fun role-play related to their volunteer experiences.
You can ensure the goals of your assignments are met and inspire your volunteers to work with your organization again by making sure you are facilitating and providing a great volunteer experience every time. A volunteer who was asked to complete tasks not originally assigned, or who was not well utilized during an assignment, is unlikely to be productive on-site and unlikely to return to your agency again.

Ensuring a great experience for volunteers means more than planning an excellent project. It means eliciting and providing feedback, confronting issues as they happen, and encouraging volunteers to step into leadership roles.

**Best Practices:**

- Make sure the volunteer tasks and timeline for your assignments match the position descriptions you have provided for each volunteer.
- Never waste a volunteer’s time. Make sure volunteer projects are meaningful to your organization and clients.
- Provide every volunteer with a designated supervisor (volunteer or staff) for every assignment.
- Provide an official nametag or badge to volunteers and address volunteers using their first names.
- Ask volunteers for feedback about their experiences and for suggestions for improvement.
- Give volunteers feedback. Recognize great behaviors and give shout-outs with specific examples to those who have done an excellent job. If a volunteer needs to improve, offer concrete suggestions.
- Sometimes things are out of your control—clients might be late to a project, weather might literally dampen spirits. When situations like these occur, be honest with volunteers, apologize early, and encourage volunteers to come again to see your organization at its best.
- If it is your first time planning a specific type of volunteer program, source information on scheduling and feasibility from colleagues or contacts at similar organizations. There are also many additional resources online that can help you obtain this type of information.

**TIP:**

There are lots of resources about volunteer management. For more tips and examples visit:

- idealist.org
- energizeinc.com
- handsonnetwork.org
- nationalservice.gov
Worksheet 1: Scenarios for Working with Volunteers

Discuss the following scenarios with colleagues to develop ideas on how you would give volunteers feedback. Suggested responses can be found on the next page.

Scenario #1
A local public school has a mentoring program for some of its students. Every month, all mentors and students go on a field trip together, accompanied by two school staff members. During last weekend’s field trip to the Bronx Zoo, Jane, one of the volunteer mentors, purchased a stuffed animal and a T-shirt for her student mentee. After seeing their peer with his new souvenirs, all of the students started asking for their own toys and souvenirs, but purchasing gifts is against the rules of the mentoring program. This created a conflict for the other mentors. After the program, three mentors and two parents called the school to complain about the incident. As the head of the mentoring program, what do you say to Jane?

Scenario #2
A senior center has a robust volunteer program, and every volunteer goes through a standard on-boarding process with you, the volunteer manager. Last week, when you arrived to greet volunteers, you found that several had arrived early and were already engaging with the seniors who had been eagerly waiting to greet them. You quickly noticed that one of the new volunteers, Dan, had brought a friend who you had never met before and who had not participated in an orientation or any other part of your on-boarding process. Dan and his friend Alex were playing a game of Backgammon with one of the seniors and seem to be having a great time. What do you say to Dan and his friend?

Scenario #3
As the volunteer manager at a homeless shelter, you pride yourself on providing a positive and welcoming community for both residents and volunteers. Over the past few weeks, you have noticed that one of your volunteers, Maria, has seemed disengaged and uncomfortable around some of the residents. Today, on the assembly line during meal service, you see that Maria isn’t being friendly or welcoming to the residents. Maria is a volunteer from the Workforce Development Corporation and still needs to fulfill 15 hours of service. As her supervisor, you need to submit a mid-term evaluation, but want to have a discussion with her first. What do you say to Maria?
Worksheet 1: Working with Volunteers Scenarios

Suggested responses

Scenario #1 – Local Public School

Here’s the problem:
• Jane did not follow established policies and procedures.
• Jane has caused conflict for both fellow volunteers and clients.

A few solutions:
• Be clear about your policy before the project, and reiterate it several times. Preventing this behavior is easier than dealing with it after the fact.
• Talk to Jane and explain to her what the problem is. Make sure she understands what she did wrong, and it is a clear policy violation.
• Address the situation with the other volunteers and parents. Apologize and let them know you are addressing the incident with Jane and it won’t happen again.

Keep in mind:
• You should review important policies with volunteers when they begin volunteering. Provide volunteers with a copy of important policies for their records.
• Ask volunteers to sign that they have received a copy of your policies and procedures, and they understand them. This will help you hold volunteers accountable.
• When talking to Jane, be clear about expectations and next steps. For example, you can refer back to the policies and procedure document Jane signed to make her accountable for her actions. For next steps, let Jane know what you expect from her going forward. If this affects her volunteer status, or might in the future, clearly explain the consequences she faces (e.g., “If this happens again, it will affect your ability to volunteer with us”).
• When addressing the other volunteers and parents, assure them that you are dealing with the situation, but do not comment on specific action you are taking with regard to Jane’s status. Maintaining confidentiality for Jane is important as well.

Scenario #2 – Senior Center

Here’s the problem:
• Alex has not been through your training and onboarding process, so you do not have any information on him and he has not signed a liability waiver.
• Dan has disregarded your policy on bringing guests to projects.

A few solutions:
• Pull Dan and Alex aside and explain the required training and on-boarding. Make sure that both Dan and Alex understand the problems caused by Alex’s presence.
• Let Alex know that he cannot remain on the project. Encourage him to sign up for your next training, or fill out a volunteer application so he can join in next time.
• Remind Dan that it is not acceptable for volunteers to bring guests to projects. Explain that Alex is more than welcome to return next time if he goes through the appropriate training process.

Scenario #3 – Homeless Shelter

Here’s the problem:
• Maria is not engaging with the clients.
• Maria is not providing the quality of volunteer service that your organization expects.

A few solutions:
• Set up an appointment to speak with Maria privately. These conversations should not happen in front of clients or other volunteers.
• Explain to Maria why it is important for her to engage with the clients and be welcoming when providing service.
• Give Maria clear guidelines on how to improve her performance.
• Be honest about your evaluation. Let Maria know what it will say and how she can change your perception.

Keep in mind:
• Playing to the volunteer’s strengths and preferences is important. Maria may not be doing the right job. Talk to her about what she likes and dislikes about volunteering with you. For example, perhaps she truly enjoys chopping the veggies and washing dishes, but doesn’t know what to say to clients. In that case, perhaps she would provide better service if you stationed her in the kitchen instead of on the meal service line.
• Set expectations in the beginning. When Maria first comes to meet with you and informs you that she will need a review, let her know what you need to see in order for her to receive a favorable review.
• Speak with Maria as soon as you notice the unacceptable behavior. Don’t wait until review time! Instead, give her the chance to impress you and turn it around.
Worksheet 1: Working with Volunteers Scenarios

Keep in mind:
- You should review important policies with volunteers when they begin volunteering, including your policy on bringing guests.
- Ask volunteers to sign that they have received a copy of your policies and procedures, and they understand them. This will help you hold volunteers accountable.
- When talking to Alex, be as positive as possible. Even though he cannot stay and will need to come back, you want to encourage him to take that next step and not be discouraged.
- When addressing Dan, be clear that this rule was clearly stated when he agreed to your policies and procedures. If this affects his volunteer status or might in the future, clearly explain the consequences he faces (e.g., “If this happens again, it will affect your ability to volunteer with us”).

Scenario #3 – Homeless Shelter

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- Speak with Maria as soon as you notice the unacceptable behavior. Don’t wait until review time! Instead, give her the chance to impress you and turn it around.
# Worksheet 2: Volunteer Evaluation and Feedback Form

The following form can be modified to fit the needs of your organization.

<table>
<thead>
<tr>
<th>Volunteer Name</th>
<th>Volunteer Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Started</td>
<td>Date</td>
</tr>
</tbody>
</table>

On a scale of one to five (five being best), rate the above volunteer on the following elements:

The volunteer is conscientious about arriving on time, and about notifying others in advance of cancellations.

1  2  3  4  5

The volunteer performs all tasks and duties effectively and with care.

1  2  3  4  5

The volunteer is pleasant and courteous to staff and clients.

1  2  3  4  5

Describe the volunteer’s strengths and how they have contributed to the organization’s mission and strategic goals.

Describe how the volunteer can improve her/his work with your organization.

Additional comments

_____________________________  ____________________________  ________________________________  ____________________________
Supervisor’s Signature               Date                         Volunteer’s Signature               Date
Using volunteers to train, manage, and provide feedback to other volunteers is a key component of a great volunteer management system. Creating a “lead volunteer” role conserves staff resources, provides leadership opportunities for committed volunteers, and offers inspiration to new volunteers—enabling you to build capacity and advance your organization’s mission. With proper training, volunteers can take on nearly any role in your organization, and lead and teach other volunteers to do the same.

There are a few ways to create leadership positions for volunteers. You might begin with the same steps that you used to start your general volunteer process, including position descriptions, an interview, and on-going feedback. Or lead volunteers may emerge naturally from your volunteer pool—those who have been working with your organization for a long time, are exceptionally committed, have a special skill, or can come up with enthusiastic new ideas. Once those volunteers are identified, begin a conversation about leadership opportunities.

**Best Practices:**

- Think broadly about what kinds of volunteers can be leaders. The key characteristics needed are a willingness to learn and enthusiasm for your organization.
- It is critical to ask volunteers to step into leadership roles rather than assume they will naturally be drawn to the role.
- Use lead volunteers to help manage nearly any piece of the volunteer process including recruitment, intake, training, project management, and feedback—these are great ways for experienced volunteers to do more.
- Ask your best volunteers to help you manage other volunteers.
- The role of a lead volunteer doesn’t have to start and stop with a specific timeframe. Volunteers with leadership roles can confirm details with agency staff and communicate with volunteers before, during, and after a project.
- Lead volunteers get to learn and practice new leadership skills while also knowing they are contributing to your overall mission.
- Lead volunteers are still volunteers. They still need feedback, recognition, and their time should be well-managed.
- Board members can be considered the ultimate volunteer leaders. They lead the strategy, mission, and operations of your organization.
Worksheet 1: Volunteer Leaders Brainstorm

Discuss the following topics with colleagues to determine the best way to begin using volunteers in leadership roles at your organization.

What is a leader?

What are the ideal traits of a lead volunteer for our organization?

What characteristics, skills, or knowledge would we like our lead volunteers to already have?

Are there people we already have in mind that could be developed into great leaders?
**Worksheet 2: Sample Leader Volunteer Position Description**

Below is an example of the volunteer position description New York Cares uses to recruit volunteer leaders.

**About Volunteer Leaders at Our Organization:** Team Leaders embody the heart of New York Cares projects. Each New York Cares project must have a Team Leader who volunteers on behalf of New York Cares, enabling us to offer as many as 1,500 volunteer projects every month at locations throughout the city. This special group of people consists of volunteers who make a commitment to help manage a volunteer project for a few hours each week or month, depending on the project. Team Leaders work closely with New York Cares and their Project Partners to lead effective hands-on volunteer projects.

**Title:** New York Cares Team Leader

**Position reports to:** New York Cares Program Manager

**Types of agencies:** Public Schools, Senior Centers, Nursing Homes, Community Technology Centers, Tier II Shelters, Soup Kitchens and other Community-Based Organizations.

**Project meetings:** Varies depending on specific project. Most projects meet once monthly, but many meet twice per month or weekly.

**Goal of the project:** Varies depending on specific project.

**Length of volunteer position:** Six months to one year, flexibly scheduled projects.

**Time requirements of position:** Lead projects on a monthly basis, consistently return project reports to Program Manager, attend planning sessions with New York Cares and Project Partners as needed.

**Requirements for position:** The Team Leader application process involves five steps: attend a New York Cares orientation and at least three projects, complete a short Team Leader application form, schedule an interview with a New York Cares staff member, complete an online training, and attend a two hour Team Leader in-person training session. Team Leaders are also required to complete a background screening form and confidentiality agreement, including providing a valid Social Security Number.

**Skill requirements for position:** Team Leaders should be active New York Cares volunteers with an interest in volunteerism; should have confidence in their ability to lead groups and to teach others; and should have a proven ability to problem-solve and work with teams, demonstrating strong leadership skills.
Worksheet 2: Sample Leader Volunteer Position Description

**Project-Related Responsibilities:**

**Before the project:**
- Attend planning meetings with the Program Manager and Project Partner as needed.
- Confirm project dates, meeting time and place, and task-specific details with Program Manager and Project Partner.
- Accept and return volunteer phone calls and e-mails, view team lists and organize team online. Send team reminders through the website and use the online system to update volunteers on any project changes.
- Confirm volunteer attendance and check in with Project Partner one week prior to the project date.

**During the project:**
- Take accurate attendance, including no-shows.
- Provide volunteers with information about the agency and the impact of their service.
- Have Project Partner give comprehensive overview of tasks for the day, providing hands-on demonstrations when necessary.
- Facilitate the group in completing tasks, ensuring quality work.
- Check that any agency spaces are tidy and in their original state at the end of the project.

**After the project:**
- Host a project debrief to gain feedback from volunteers and share your own experiences.
- Update volunteers on ongoing training and skills-enhancement opportunities.
- Share successful project ideas and feedback with Program Manager and with other Team Leaders.
- Submit volunteer attendance and impact numbers online.
- Thank volunteers for coming via a group e-mail message sent from the New York Cares interactive Web site and follow up with no-show volunteers.

**Benefits:** Enthusiastic and supportive project atmosphere. Leadership training and project management training. This is an excellent opportunity for any New York Cares volunteer with an interest in becoming more involved and spreading his/her positive attitude and outlook about volunteerism and New York Cares. This position potentially provides opportunities to learn about a multitude of issues facing many New York City residents such as homelessness, hunger, the digital divide, and literacy problems. This opportunity also provides the chance to discover information about a variety of local nonprofit organizations, and to build skills in volunteer training and project management.

For Further Information: Contact the New York Cares Leadership Development team at leadership@newyorkcares.org, or call (212) 228-5000.
# Worksheet 2: Sample Leader Volunteer Position Description

<table>
<thead>
<tr>
<th>About Volunteer Leaders at our organization:</th>
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</table>

<table>
<thead>
<tr>
<th>Title:</th>
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</table>

<table>
<thead>
<tr>
<th>Position reports to:</th>
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<table>
<thead>
<tr>
<th>Project-related meetings required:</th>
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<table>
<thead>
<tr>
<th>Goal of the project:</th>
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</thead>
</table>

<table>
<thead>
<tr>
<th>Length of volunteer position:</th>
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</table>

<table>
<thead>
<tr>
<th>Time requirements of position:</th>
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</thead>
</table>

<table>
<thead>
<tr>
<th>Requirements for position:</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Skill requirements for position:</th>
</tr>
</thead>
</table>

| Project-related responsibilities: |

  * Before the project:  
  * During the project:  
  * After the project:  

| Benefits: |
Topic 7: Recognizing and Retaining Volunteers

Just as we like to feel appreciated by our coworkers, peers, friends, and family, volunteers like to be recognized and thanked for their service. Recognizing volunteers individually for their contribution and their impact on your mission is critical to helping them understand the importance of their work, making them feel appreciated, and encouraging them to return to your organization and get involved more deeply. People start volunteering for a variety of personal reasons but the primary reason people return is that they feel they have made a difference. Recognizing volunteers for their service increases the amount of times an individual will return to volunteer, and it increases the likelihood that s/he will take on leadership roles.

While a simple verbal “thank you” is a great start, consider developing more advanced recognition methods and consider different strategies for different types of volunteers. Additional leadership opportunities, celebration and recognition parties, written (even handwritten!) notes, and recognition certificates are all great ways to recognize volunteers. The best recognition is timely, frequent, consistent, and personal.

Best Practices:

- Make sure to say thank you at the end of each volunteer project, even if you have consistent volunteers.
- Be genuine when thanking and recognizing volunteers.
- Be specific and include great examples of particular actions a volunteer took and their impact on your organization and clients.
- Develop a recognition calendar to ensure you are on schedule and consistently recognizing volunteers for their service.
- Brainstorm with staff and leadership volunteers about creative ways, specific to your organization, that you can thank and recognize volunteers. Make recognition meaningful to your volunteer base: some volunteers may appreciate being recognized publically while others would prefer a handwritten note or more private recognition.
- Develop a system of awards and rewards, including using the Presidential Service Award.
- Serve as a reference for volunteers who are applying for work or further schooling.
- Write commendation letters to a long-term volunteer’s current school or employer.

TIP:

Ideas for recognition include:

- Individual thank you notes from clients
- Celebrations during Volunteer Appreciation Month in April
- Networking events
- Public recognition on social media or in a newsletter
- “Promotion” to a role with more responsibility

Register for the Presidential Service Award at presidentialserviceawards.gov
Worksheet 1: Mapping Your Organization’s Current Recognition Activities

It can be helpful to chart out what you are already doing to recognize volunteers. Use the table provided to plot the ways you currently provide volunteer recognition. Also identify the audience that is being recognized and who is responsible for overseeing the recognition. The best recognition plans happen regularly, so be sure to write your activity on a calendar.

<table>
<thead>
<tr>
<th>Recognition Method</th>
<th>When is it Utilized? (How often and for what milestone?)</th>
<th>Target Audience (What types of volunteers?)</th>
<th>Who is Responsible for Implementing?</th>
<th>Organizational Calendar (when in the year do you use the outlined strategy?)</th>
</tr>
</thead>
</table>
**Worksheet 2: Recognizing Volunteers—Strategy Development Questionnaire**

Great volunteer programs recognize volunteers strategically. This means recognition should encourage the behavior you want to see. Your most productive volunteers should be recognized quite a lot and in many ways but, for a one-time volunteer, a single thank-you email may suffice. Review the following questions with your colleagues to further develop your volunteer recognition strategy. These questions can help you decide if you are using recognition in the most effective ways.

<table>
<thead>
<tr>
<th>Question</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who are my most productive volunteers?</td>
</tr>
<tr>
<td>What are the common characteristics of my most productive volunteers?</td>
</tr>
<tr>
<td>What motivates my volunteers?</td>
</tr>
<tr>
<td>How do I currently encourage a volunteer to become more engaged?</td>
</tr>
<tr>
<td>How do I, as an individual, currently recognize volunteers?</td>
</tr>
<tr>
<td>How does my organization currently recognize volunteers?</td>
</tr>
<tr>
<td>Does a targeted communication strategy fit my organization? Why?</td>
</tr>
<tr>
<td>Do I have a budget associated with recognition? Is it adequate?</td>
</tr>
<tr>
<td>What are other, non-financial, constraints to recognizing volunteers?</td>
</tr>
</tbody>
</table>
Topic 8: Tracking Volunteer Impact

Maintaining records about your volunteers and the impact they make on your mission is critical for ensuring client and volunteer safety; assisting with fundraising and grants; planning future volunteer programs; making the case for supporting volunteers and the staff members who work with them; and planning programs for the future. Tracking demographic information about your volunteers allows you to have a deeper understanding of your current volunteer base. Keeping track of the impact of volunteers has nearly limitless uses.

Use a database or, at a minimum, a simple spreadsheet to keep track of your volunteers and their impacts. Volunteers can provide optional demographic information about themselves like gender, age, level of education, and area of residence. Agency staff or volunteer team leaders can track volunteer activity including date, time, frequency of service, and types of tasks completed. Include measurable data like how many clients a volunteer tutored or how many meals were served. Tracking the outcomes of volunteer activity will help you determine what volunteers accomplished and what you could not do without their service. It will also be invaluable when you need to demonstrate the impact your volunteers make to internal and external audiences. Examples of outcomes include number of students graduating, adults with increased knowledge of financial literacy, or number of youth or seniors with positive attitudes about exercise.

Best Practices:

• Gather contact and demographic information as part of your intake process.
• Enlist volunteer leaders in helping you to collect and track data. Volunteer leaders can enter assignment-based statistics.
• Identify outcomes of target volunteer roles. For instance, volunteer high school tutors should not only track the attendance of students, but students’ improvement throughout the program.
• Use pre- and post- surveys for volunteers and clients to track outcomes.
• Determine the best database for tracking your volunteers’ service. A simple spreadsheet is a great place to start if this is the first time you are tracking volunteer impacts.
• Collect volunteer impacts and use them to make the case for increased programming and to bolster grant and funding proposals. Work with Development or Communications staff at your agency to explore options.
• Create a how-to guide for entering volunteer information and impacts so that staff and leadership volunteers enter information in a consistent manner.

TIP:
For technical database assistance visit idealware.org or Npower’s Community Corps website, thecommunitycorps.org.
Worksheet 1: Developing Your Volunteer Tracking System

Tracking volunteers is an important responsibility and procedures should not be developed without input from many stakeholders. There are a lot of resources available on the Internet to guide your decision-making process.

Discuss with colleagues the following current and future strategies for project and volunteer tracking to begin to identify the best practices for your organization.

1. Are we already collecting information about volunteers?
   
   a. If yes, what information do we already collect?

   b. If yes, when do we collect this information?

   c. If yes, what additional information do we think we should collect?

   d. If no, do we have other tracking systems for staff, development, or programs that could also track volunteers?

   e. If no, what are the steps necessary to modify our tracking systems so that they also track volunteers?

2. Do we have a budget or staff for maintaining tracking systems? There are options available for organizations with limited staff and budget.

3. What kind of impact do we hope our volunteers have on our clients and mission? What ideas do we have about how to measure this information?
Topic 9: Board Management as Volunteer Management

Your board members are important volunteers with your organization and are key to meeting your mission. Their role is one of the highest forms of volunteerism for a nonprofit. Many of the same principles of good volunteer management also apply to your board of directors, although most need to be outlined and more detailed to address the needs of this important volunteer group.

Best Practices:

• Incorporate board procedures into your bylaws, including all functions of the board, executive positions, and term limits. Your bylaws should be a guide in successful board engagement, but in order to be effective, they must be specific to the needs of your organization and meeting your mission.

• Be clear on the roles and responsibilities for members of your board of directors. Consider what expectations you have for this key group in terms of conducting organizational operations, governance of the organization, and supporting the staff in meeting the organization’s mission. Also include additional expectations of board members, including fundraising and other essential functions.

• Ask board members to sign a letter of agreement. This ensures that they are fully invested in the role they are taking on and have a complete understanding of what is expected of them.

• Provide a new board member orientation for those who are just joining your board of directors. Onboarding should include visits to your programs so board members can connect with your mission, overview of their roles and responsibilities, and next steps. Orientation is best coordinated by the current board chair or executive committee.

• Consider outlining term limits for board members and members of your executive board. Not all organizations have or enforce strict term limits, but it can be helpful in bringing new life to the board and allowing the most highly engaged members to take a step back and perhaps take on a different role.

• Assist the executive leadership of the board in establishing protocols for board meetings and business. Your board members are busy, and the work they are doing is important, so it is key to make the best use of their time at board meetings. Consider using Robert’s Rules of Order as common guidelines for how board meeting run and have clear policies on how decisions are proposed, discussed, and voted upon.

• Your board should grow and change with your organization. Once you have your board management and structure in place, conduct an annual self-assessment to identify any gaps or areas for change.

• Establish committees of the board to further your work. Consider committees by issue area and function. Make sure committees have a solid structure, clear deliverables, and regular interaction with senior staff. Sample committees include fundraising, communications, nominating, and finance.

TIP:
For more detailed information on board management, look at NYC Service’s Guide to Good Governance at nyc.gov/goodgovernance.
• Recognize board members for their commitment to the organization and their accomplishments on your behalf. Consider what you can do for them as an organization, and look for external sources of recognition, including awards nominations and other opportunities for board visibility.

• Include a board list in printed materials, such as brochures or annual reports, and provide copies to board members.
Worksheet 1: Sample Organizational Board Assessment

What are your organizations top five priorities within the next 12 months? (List in order of importance.)

1. ______________________________________________________________________
2. ______________________________________________________________________
3. ______________________________________________________________________
4. ______________________________________________________________________
5. ______________________________________________________________________

Are the roles of the executive leadership of the board clearly defined?

Does the Executive Director report directly to the Board of Directors? Does the Board of Directors hire the Executive Director?

Is the Board clearly seen as working on behalf of the organization within the community?
### Worksheet 1: Sample Organizational Board Assessment

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the Board actively participate in the strategic planning process?</td>
<td></td>
</tr>
<tr>
<td>Does the Board have clear policies for nominating new members and executive leadership? Does this process ensure diversity among the board?</td>
<td></td>
</tr>
<tr>
<td>How are new board members oriented upon taking on their role?</td>
<td></td>
</tr>
<tr>
<td>What training does the board receive throughout their tenure?</td>
<td></td>
</tr>
<tr>
<td>Are there clear board documents and guidelines, including descriptions for all positions and committees of the board?</td>
<td></td>
</tr>
</tbody>
</table>
## Worksheet 1: Sample Organizational Board Assessment

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the organization have formally adopted bylaws that conform to federal and state statutes? If so, does the board meet the minimum number of members as indicate in the organization's bylaws?</td>
<td></td>
</tr>
<tr>
<td>Does the board review the bylaws annually?</td>
<td></td>
</tr>
<tr>
<td>Does the board have an annual calendar of meetings and activities?</td>
<td></td>
</tr>
<tr>
<td>Do board meeting align with attendance requirements as stated in the bylaws? Is a quorum of the board present at each meeting?</td>
<td></td>
</tr>
</tbody>
</table>
Engaging financial supporters—whether they are current donors, corporate volunteer groups, foundation staff, or boards—in direct service can bring resources to your organization and deepen the connection your donors have with your mission.

Design volunteer opportunities with supporters in mind. Corporate donors will likely appreciate opportunities for group-based volunteering, while individual donors may appreciate smaller scale projects with a skill-based component. When building a corporate volunteer program, look to leadership volunteers and your Board of Directors for good connections in their companies. Once you have outlined some groups to start engaging, follow the processes for individual volunteers and make sure volunteer groups are tracked, trained, and recognized.

**Best Practices:**

- Ensure that the assignment or position descriptions for corporate and financial supporters fill an authentic need at your organization and that the tasks further your mission and goals.
- Think broadly about how financial supporters can volunteer at your organization. Consider the types of professional or expert help your organization needs, and find out if corporate volunteers can fill those roles.
- Keep in mind that volunteer groups may also be interested in working on projects that are outside their profession. For example, financial services employees might want to paint your facility.
- Remember that corporate and other donors may be able to help out with additional resources if asked, whether financial or in-kind.
- Provide feedback to volunteers and main contacts, and solicit feedback on how to improve programs for their volunteers specifically.
- Work to create a meaningful relationship with corporate and financial supporters by providing updates on their work, on successes and challenges at your organization, and on continuing engagement opportunities.
Worksheet 1: Where Should We Begin?

Discuss the following current and future strategies for project and volunteer tracking with colleagues to begin to determine the best practices for your organization.

1. Who are our key financial supporters? Include corporations, foundations, and individuals.

2. Has any donor approached us about direct service before? Were we able to offer a volunteer project or experience?
   a. If yes, what group did we engage and what did they do?
   b. If no, what would we have needed to be able to engage them?

3. What groups are already affiliated with our organization that might be a good place to start?

4. What kinds of skilled volunteer or pro-bono assistance do we need?

5. What kinds of financial or in-kind resources would be helpful to our organization?
Worksheet 2: Develop a Pitch to Promote Your Volunteer Program

Use the form below to outline the elements of your pitch in order to solicit support for your volunteer management program.

Here is an outline of the proposal:
  *Your mission, vision, and volunteer service goals*

*Impact of volunteer service*

*Strategies to increase volunteers and impact*

*Resources required to support volunteer service*

*Messaging to ask for your team’s support*

*How can an external stakeholder support your program?*

*Demographics (e.g. age) of your volunteer corps*
Topic 11: Working with Youth Volunteers

Youth volunteers are an often untapped resource. There are many individuals, families, schools, and community groups looking for opportunities to get youth involved with volunteering. By utilizing youth volunteers who are eager to learn, you may be able to cut costs and increase your capacity.

Youth are enthusiastic, energetic, and ready-to-give. Providing volunteer opportunities for youth and welcoming them into your organization brings a fresh perspective to the work that you do and allows you to shape the next generation of volunteers. When working with youth, be sure to develop programs that are suitable for different ages. You can start by breaking more complex tasks into smaller steps that can be divided among volunteers of different skills and abilities.

Best Practices:

• Be clear on what your age restrictions are and don’t make exceptions.
• Connect with schools, community centers, and after-school programs to recruit youth volunteers.
• Track youth volunteers’ service hours. Youth often request signed letters to show that they volunteered.
• Require a parent or legal guardian’s permission for any youth to volunteer. Remember, only a parent or a legal guardian may take responsibility for individuals under the age of 18. Signatures of teachers, coaches, counselors, other family members, etc. are not valid for waiver purposes.
• Ensure staff has been properly trained and screened before supervising youth volunteers.
• Supervise youth at all times. Below is a guide for the suggested ratio of adults to youth volunteers. The appropriate ratio of adults to youth volunteers may vary depending on the project tasks and your organization’s experience with youth.

<table>
<thead>
<tr>
<th>Age of Youth</th>
<th>Adults to Youth Volunteers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-K to Grade Three</td>
<td>One Adult per Five Youth (1:5)</td>
</tr>
<tr>
<td>Grade Four to Grade Eight</td>
<td>One Adult per Eight Youth (1:8)</td>
</tr>
<tr>
<td>Grade Nine and Up</td>
<td>One Adult per Ten Youth (1:10)</td>
</tr>
</tbody>
</table>
Worksheet 1: Questions to Ask When Considering Working with Youth

Have youth ever informally helped out at your organization? What did they do? Could that task be expanded?

Where can you find youth volunteers? What schools, community centers, after-school programs, or other youth-based organizations exist in your community?

How will you engage youth volunteers? How will you decide the tasks that are appropriate? How will you make sure the tasks are safe?

Who will supervise the youth volunteers? Who will ensure that your organization’s guidelines are followed? How will you manage challenging youth volunteers?
Youth volunteers are an often untapped resource. There are many individuals, families, schools, and community groups looking for opportunities to get youth involved with volunteering. By utilizing youth volunteers who are eager to learn, you may be able to cut costs and increase your capacity.

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Best Practices:

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• Connect with schools, community centers, and after-school programs to recruit youth volunteers.
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• Ensure staff has been properly trained and screened before supervising youth volunteers.
• Supervise youth at all times. Below is a guide for the suggested ratio of adults to youth volunteers. The appropriate ratio of adults to youth volunteers may vary depending on the project tasks and your organization's experience with youth.

Worksheet 2: Sample of a Waiver for Youth Volunteers

Note: This is an example only. Consult your legal team for your organizational requirements.

In consideration for permission for __________________________ (the “Child”) to participate in volunteer project(s) and/or volunteer trainings (the “Activities”) offered by __________________________ (name of organization), I do hereby acknowledge, consent and agree to all of the following terms and conditions.

I declare and represent that I am the parent or guardian of the Child.

I declare and represent that the Child is now in good health; that I have discussed with the Child the nature of the Activities in which the Child plans to participate; that I and the Child understand the nature of the Activities; that the Child is physically and medically fit to participate in the Activities; and that the Child's personal attire and equipment are safe and fit for their participation in the Activities. I acknowledge that participation in the Activities involves certain risks and hazards of injury and/or property damage. I am aware that the Child may travel to or from the Activities on his or her own and without supervision. I and the Child assume the risk of the Child's participation in the Activities.

In consideration of the Child’s acceptance as a participant in this event, I agree to release, defend, indemnify and hold harmless __________________________ (INSERT YOUR ORGANIZATION NAME), its volunteers, employees, officials, directors, agents, affiliates and sponsors from any and all claims for any and all expenses, personal injury, loss or damages incurred or caused by the Child to the Child’s person and/or property during or in connection with the Child’s participation in this event.

This release shall be binding upon my heirs, next of kin, distributees, executors and administrators.

I hereby attest that the Child's attendance and involvement in this Activity is voluntary and that I have read (or have had read to me) this release, understand it and sign it voluntarily.

Child’s Name: ___________________________________________
Signature of Parent or Guardian: _____________________________
Printed Name of Parent of Guardian: __________________________
Relationship to Child: ______________________________________
Date Signed: _____________________________________________

Emergency Contact: _______________________________________
Relationship to Child: ______________________________________
Phone to contact number while volunteering: (_____ )____-___________
Topic 12: Working with Older Adult Volunteers

Don’t overlook seniors in your recruiting efforts. The skills and time that older adult volunteers possess can be a valuable resource for your organization. The New York City Department for the Aging reports that New York’s over-60 population is projected to increase to 1.84 million by 2030. According to the Corporation for National and Community Service, these baby boomer volunteers have the highest volunteer rate of any age group. Draw them to your organization by creating compelling opportunities for them to use their skills. By better understanding the characteristics of older adult volunteers and making assignments accessible to them, organizations can significantly increase their volunteer base and capacity for programs.

**Best Practices:**

- Connect with community centers, religious institutions, civic groups, and employers to recruit older adult volunteers.
- Schedule a variety of opportunities to appeal to older adults with a broad range of experience, skills, and interests.
- Shift to a skills-based volunteering model by leveraging the professional skills of your volunteer base to meet diverse organizational needs.
- Add a professional experience component to your volunteer application to identify relevant skills.
- Older adult volunteers have full and busy lives. Be flexible in offering a variety of time commitments for volunteer training, development, socialization, and recognition events. Consider one time, episodic, and short-term volunteer opportunities, as well as more traditional ongoing assignments.
- Use large font (14-point or larger) in promotional, training, and other materials the volunteers will need to read or use.
- If budget permits, provide a free meal or stipend to older adult volunteers. These benefits are particularly meaningful to older adults.

**TIP:**

Make your volunteer environment age-friendly. Set out chairs for volunteers, make sure assignments are easily accessible, and have projects in rooms with plenty of light and easy access to restroom.
Worksheet 1: Questions to Ask Yourself When Working with Older Adults

How does your organization traditionally utilize volunteers? Could those tasks be expanded to include skills-based volunteering opportunities? What are some examples?

Where can you find older adult volunteers? What community centers, religious institutions, civic groups, employers, or other organizations exist in your community?

How will you engage older adult volunteers? How will you make sure the tasks are of interest to volunteers and match their skill sets?

How will you support and supervise older adult volunteers? What feedback mechanisms are in place to gather information about the volunteer experience?
Topic 13: Managing Volunteers During Times of Crisis

In the wake of a disaster, many individuals seek out ways to help their communities recover. During these times, it is important to leverage volunteers to give back in a safe and efficient manner. Additionally, it is important to effectively manage this surge in interest throughout each aspect of disaster response. The reality is that many volunteers will step forward in the immediate aftermath, but much more will be needed in the weeks, months, and years following the disaster.

**Best Practices:**

- **Determine whether your volunteers can help.** Some organizations may not have the need or ability to engage their volunteers in disaster work. If you cannot effectively engage volunteers in disaster-related service, help them connect with an organization that can provide them with a safe and appropriate way to give back.

- **Set clear expectations from the very beginning of the volunteer’s assignment.** Volunteers may expect to be working directly in affected areas or with victims, but this is not always possible. Make sure the volunteer is clear on his/her assignment from the start.

- **Make sure your volunteers are clear on what their impact will be and how they will be helping in the wake of the disaster.** Volunteers have stepped forward to take immediate action and often get frustrated if they do not see immediate results. However, the reality is that many situations will not see immediate, sustainable results for months or even years. It is important to help volunteers understand that every minute they give makes a difference in helping the community recover.

- **Have established safety procedures for all volunteers, and share them widely within your organization and with volunteers themselves.** It is important to make sure that volunteers are giving back in an effective and safe way. For example, have a brief safety overview at the start of each project, and make sure volunteers know where emergency exits are while they are volunteering and whom they should speak to if there is an emergency situation while they are on site.

- **Make a plan for volunteer self-care, especially for long-term volunteers.** The stress of response and recovery takes its toll, and as volunteer managers, it is up to us to make sure our volunteers take care of themselves while they are taking care of others. You can offer counseling opportunities to volunteers who work with you frequently or put limits on how many hours volunteers can contribute in one week.

- **Keep all messaging consistent and respond to volunteers promptly.** It is critical to keep frequent and consistent communication with volunteers early on since you will need them to keep coming back for long-term recovery projects.

**TIP:**

Have a Continuity of Operations Plan (COOP) for your organization and integrate volunteer engagement into that plan. You cannot effectively engage volunteers or host opportunities if your organization does not have a solid foundation post-disaster.
**Worksheet 1: Engaging with Volunteers Post-disaster**

Ask yourself the questions below when considering your organization’s ability to manage volunteers during a disaster.

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do you have a plan for your office and staff if an emergency were to happen during business hours?</td>
<td></td>
</tr>
<tr>
<td>Does your staff have a check-in plan to contact you if an emergency were to happen outside of business hours?</td>
<td></td>
</tr>
<tr>
<td>How would you reach out to volunteers if an emergency occurred? (Who is responsible? How and what would be communicated?)</td>
<td></td>
</tr>
<tr>
<td>What critical programming do you run that would still take place during a disaster?</td>
<td></td>
</tr>
<tr>
<td>Do you have a plan to prioritize programming during a disaster? If so, what is the plan? How is that communicated to your staff? To your volunteers?</td>
<td></td>
</tr>
<tr>
<td>Do you have additional volunteer needs during a disaster? How would you recruit for them? Do volunteers know their role might be different?</td>
<td></td>
</tr>
</tbody>
</table>
Worksheet 2: Creating a Continuity of Operations Plan

Setting up a COOP is key for your organization’s preparedness strategy, and it is important that this plan addressed your key functions and align with your mission. You will specifically need to address these essential functions in terms of how you will maintain them when resources and staff time is tight. A sample COOP outline is below.

**Introduction**

**Purpose of the Plan**
Think about the goal of your plan. Focus on if/then statements to set clear expectations from the start on how and when you will activate your plan. For example, “If a local emergency occurs that disables the location of our office, then we will activate specific aspects of the plan.”

**Key Definitions**
Think about your standards and how you define them. For example, is a local emergency limited to your neighborhood or your borough? Consider industry standards when offering definitions, and make sure to outline this part of the plan as if the person reading and implementing the plan has no background knowledge on preparedness planning.

**Partnerships**
What key relationships have you established pre-disaster that will be important in ensuring your continuity of operations? How can staff negotiate or utilize these contacts in an emergency?

**Preparedness**

**Staff Roles and Responsibilities**
What are the responsibilities of your staff both during an emergency and during ongoing operations? During ongoing operations, who will manage the plan, and how will it be kept fresh in the minds of your staff members? During a disaster, how will their role be different? What additional responsibilities will they have? How will they prioritize these responsibilities with their current workload?

**Pre-established Best Practices**
Provide a list of best practices for your staff, so they know how to be prepared should something happen. Make sure to share this with new staff as they join your organization, and train them on how to maintain these best practices as a part of their day-to-day work.

**Preparedness Schedule**
Provide a schedule for regular training and review of the plan and procedures. Consider holding annual exercises so staff may rehearse their roles. This will also help you identify any gaps in the current plan, and make changes to address those gaps.
Worksheet 2: Creating a Continuity of Operations Plan

**Continuity of Operations Plan and Response Plan**

**Essential Functions List**
Prioritize your essential functions. What is most important to maintain? Be specific and number them in terms of priority. An example is provided below:

<table>
<thead>
<tr>
<th>Priority</th>
<th>Essential Functions</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Ensure Staff Safety</td>
</tr>
<tr>
<td>2</td>
<td>Communications and Technology</td>
</tr>
<tr>
<td>3</td>
<td>Accounting and Human Resources</td>
</tr>
<tr>
<td>4</td>
<td>Existing Programs</td>
</tr>
<tr>
<td>5</td>
<td>Citywide Response Plan and New Response Programs</td>
</tr>
<tr>
<td>6</td>
<td>Fundraising</td>
</tr>
</tbody>
</table>

**Ensuring Staff Safety**
Clearly outline emergency procedures for staff, both when they are in the office and when they are out of the office. Include things like emergency exits, external meeting locations, and emergency contact information and protocols.

**Communications and Technology**
How will your technology function during a disaster? Do you have systems in place to keep things running? Outline what staff will and will not have access to.

**Accounting and Human Resources**
Give a clear outline of the ways in which your organization will maintain these processes during a disaster, especially pay roll.

**Existing Programs**
What are the priorities in terms of programming? How should staff make decisions on what is essential and what they should shift their focus from?

**New Response Programs**
What is the plan in place for any new programs that arise post-disaster? Which staff members will focus on these new initiatives? While it can be hard to pinpoint what the specific need will be, it's important to outline a plan for who will manage new needs that arise post-disaster.
Fundraising
It's important to have a plan for fundraising post-disaster. What effort will you take to ensure key funding? How will you maintain relationships with current funders? What specifically will donor dollars be used to support post-disaster? While it can be difficult to pinpoint specific needs, it is important to be as specific as possible when outlining your fundraising plan.
Topic 14: Skill-Based Volunteers

Direct service organizations like yours use volunteers for many things—you have probably had many incredibly helpful people lend their time stuffing envelopes, serving meals, setting up chairs, and packing boxes. When there is so much work to be done, giving clear and discrete tasks to volunteers makes your work possible and allows volunteers to do good.

This chapter is not about those kinds of volunteers.

In this chapter, we’ll talk about people who can lend their specialized or professional skills to your organization. This kind of volunteerism furthers your ability to work towards your mission; it also builds stronger connections between you and your volunteers. When a volunteer’s particular skills and talents are engaged they are more likely to have a meaningful, long-term relationship with your organization.

NYC Service surveyed 50 emergency food organizations in 2014 and found that all were interested in taking on skills-based volunteers to push their work forward. The top areas of needed volunteer expertise were website development, social media and digital communications strategy, and grant writing. The following sections outline what project readiness looks like for each of these three tasks, focusing on what your organization needs to have in place to take on skills-based volunteers and use their talents effectively.
**Example: Website Development**

Website development and design is a great way to engage skills-based volunteers. Building or redesigning a website can be done off-site, makes use of a volunteer’s specific talents, can be phased, and can be completed in a reasonable timeframe. It is essential that you have everything in place to allow your volunteer to hit the ground running and work independently to create you the website that you need.

Begin by thinking through what sort of website you want. Spend some time looking at the websites of similar organizations, both in mission and in size.

<table>
<thead>
<tr>
<th>What do other similar websites include? What about the websites of different direct-service organizations, like a tutoring center?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Who the site is for? If it is for more than one of these groups, you may need separate sections.</td>
</tr>
<tr>
<td>What do you want visitors to your site to do? This will inform what pages and features you need on your website, and how your site should be organized.</td>
</tr>
</tbody>
</table>

Knowing who at your organization will be responsible for understanding, maintaining, and updating your website will also influence what features you should have. Remember that calendars and blogs need constant updating. If you can’t dedicate staff time to that, don’t add those features to your site. Also, consider the skills required for a staff member to update and maintain the site. It is important for your skills-based volunteer to build a site that is sustainable in relation to the skills of the staff member responsible for maintaining it.
Example: Website Development

Some common website pages and features:

- Front page, which includes your business address, hours, contact information, and compelling images
- About us, which includes your organization’s mission, staff list with bios, and staff contact information
- Services, which includes descriptions and schedules of your programs
- Calendar of events
- Schedule a pick-up, drop-off, or appointment
- Sign up to receive services
- Sign up to volunteer
- Donate money
- Join a mailing list
- Blog
- Streams from other social media sources, like your organization’s Twitter or Instagram accounts (see the section on social media and digital communications)

Write the content for each section in a text document. Remember: each section has to have content. You will need:

- An organizational description (best to have this at a few different lengths, ranging from catchy phrase to a few paragraphs)
- General organization contact information
- Staff list with contact information and optional photos and biographies of each staff member
- Succinct and clear descriptions of any particular services, programs, or initiatives the organization offers
- Text for any of the above pages listed that you plan to including

If you want your volunteer to write the content, this work might be done better by someone who is a skilled writer, rather than a web designer. Engage that skilled-based volunteer first, then have the content available for your designer.

TIP:
Print out each “web page” on a single piece of paper. This can help you determine which pages don’t have enough content, and which pages might need to be split into two or more.
Example: Website Development

Along with the content, provide the volunteer with links to other sites that show the features and pages that you want. This will be especially helpful for event calendars, schedules, and sign-up pages.

Just as important as well-written and organized content are the photos on your website. Good photos of the organization in action, the staff, the facilities, the intended client population, and so on make all the difference in effectively communicating information about the organization to distracted internet users. If you do not have good photos, engage a skills-based volunteer to come and take some.

Assemble and organize all the photographs before handing off to your volunteer. For the web, the photos can be small file sizes—photos taken with a smartphone can be used if they are well-composed. If you have preferences about what photos (or types of photos) to use on certain website sections, make this clear to your volunteer.

Provide your skilled volunteer with your organization’s logo (ideally in a vector-based file format like .ai, .svg, or .eps) and whatever brand or design guidelines your organization has (such as colors, shapes, fonts, and so on). If you don’t have design guidelines spelled out anywhere, provide your volunteer with any branded materials, such as business cards, signage, flyers, pamphlets, or truck-side murals.

If you don’t have logos in the right format (or at all), or design schemes to match, this will make more work for your web designer and might extend the length of the design project.

If you plan on producing print materials, you might engage a skills-based volunteer with design skills to create these graphic elements before making your website, or have a graphic design volunteer work off of what has been created by the web design volunteer. For print, you will need photos with larger file
## Checklist for Website Development

You’ll want to provide these things to your website volunteer:

<table>
<thead>
<tr>
<th>Item</th>
<th>Requirement</th>
</tr>
</thead>
<tbody>
<tr>
<td>List of pages and features and thoughts on site organization</td>
<td></td>
</tr>
<tr>
<td>Reference links to examples of pages and features</td>
<td></td>
</tr>
<tr>
<td>Content for each page, including</td>
<td></td>
</tr>
<tr>
<td>Organizational description</td>
<td></td>
</tr>
<tr>
<td>Staff bios and contact info and photos</td>
<td></td>
</tr>
<tr>
<td>Succinct and clear descriptions of services or programs your organization offers</td>
<td></td>
</tr>
<tr>
<td>Address(es) and general organization contact info</td>
<td></td>
</tr>
<tr>
<td>Notes on what kind of photo you want with each kind of page</td>
<td></td>
</tr>
<tr>
<td>Batch of good photos</td>
<td>These could be shared on a thumb drive, or through a service like Dropbox or Google Drive.</td>
</tr>
<tr>
<td>Logo files</td>
<td></td>
</tr>
<tr>
<td>Design guidelines</td>
<td></td>
</tr>
<tr>
<td>Other branded material for reference</td>
<td></td>
</tr>
<tr>
<td>Any existing hosting and domain information or passwords</td>
<td></td>
</tr>
</tbody>
</table>
Milestones for Website Development

Check in with your volunteer at each of these milestones for two-way feedback. Make sure your volunteer is creating the website that you want, but also give them the opportunity to draw on their expertise and experience and suggest changes in the website’s structure, content, features, etc.

Milestones include:

- Site organization framework
- Overall site design
- Individual pages up
- Photos or images for each page
- Final site

Your skilled web-design volunteer will provide you with a new or newly designed website. But there are a few additional things you should be sure that they provide.

**Essential**

- Instructions for maintenance and updating the website
- Passwords for administrator accounts
- Passwords for domain ownership
- Information about the website host, including when the site needs to be renewed, and any accounts or passwords with the hosting providers

**Nice to Have**

- Access to logs or analytics that tell you who is visiting your site and other statistics
- Information about how to use or interpret these
Finally, you need to think through what happens after the site is built. At the beginning of the process you determined which staff at your organization will be responsible for maintaining, updating, and understanding the website. This is where they come in.

- Hold a training for staff on how to use the new website
- Make sure the passwords and accounts provided by your web-based volunteer are stored in an accessible place
- Set up a schedule for updates to calendars, blogs, and other features
- Determine what will happen to information submitted through the website (sign-ups, etc.)
- Ask if your skilled volunteer is available for future tweaks or fixes
- Thank your volunteer! Acknowledge their work at any or all upcoming launch parties, fundraisers, staff or board meetings. Ask your volunteer if they would like their name and contact information on the website, and for how long they would like to keep it up.
Example: Social Media and Digital Communication Strategy

Social media and digital communications can take many forms and work towards multiple goals. It is important to think about your approach in terms of strategy, or what you are trying to accomplish with your campaign, and tactics, or the tools and actions you will employ. When bringing on a skills-based volunteer in this area, it is important to make sure that person demonstrates good judgment either through work they have done in the past, or through a formal interview process. Social gaffes or inappropriate postings can really take off, and can do harm to your organization. It is also important to work very closely on content creation with your social media and digital communications volunteer, and to ensure that all social media posts are being monitored by staff. Since this volunteer is speaking for the organization, it is incredibly important that organizational staff are on top of the message being communicated.

Defining the scope of your social media campaign begins with defining your strategy, and answering broad questions about what you are trying to achieve.

| What programmatic goals are you trying to achieve with your organization overall? |
| What similar organizations are doing with their social media campaigns. Make a list of 5-10 organizations that work in a similar realm, would be possible collaborators, or have overlapping audiences. |
### Example: Social Media and Digital Communication Strategy

<table>
<thead>
<tr>
<th>What are they doing with social media and digital communications that you might want to mirror?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>What kinds of posts and what tools best engage their audiences?</td>
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</tr>
<tr>
<td>Make a list of 5-10 organizations that are doing work that is very close to what you are doing.</td>
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<td></td>
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<tr>
<td>What niches are they not filling? Consider how you may want to fill those.</td>
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</tbody>
</table>
What audiences are important to achieving those goals? If your goal is to diversify your volunteer base, you would identify a different audience.

Remember, your skilled volunteer may have expertise in matching goals to audiences, so come to the project with clear ideas but also be open to their perspective.

Provide your volunteer with a comprehensive list of the ways you currently communicate with your clients, donors, volunteers, and community members, and the different ways you engage with each. Be honest about how well these strategies are working. This will help your skilled volunteer identify gaps and suggest improvements.
Once the strategy is in place, and you are clear on what you are aiming to achieve through digital communications, you need to decide what tools you would like to use. This is the tactics part of social media strategy. You can work with your volunteer on this piece—they are the experts, after all—but knowing what tools you are interested in employing is a good place to start. Do you want to share stories through words or photographs? Do you want to keep a blog or an Instagram account? Do you want to send group text messages to your clients? Remember that these will be ongoing activities that need staff and volunteers constantly keeping them up to date.

### Checklist for Social Media and Digital Communication Strategy

- List of current communication strategies
- Access to existing social media properties, including usernames and passwords
- Access to your email platform
- Access to your website login
- Inventory of and access to photographs and videos that can be used in social media posts
- Organizational mission statement, in short, medium, and long versions
- Organizational history, facts, and statistics that might make for interesting posts
- Logos, design guidelines, or any branded materials for reference
- Messaging guidelines to shape what can or should be said in social media posts
- Stories that could be used for social media content
- A list of people at the organization who could help with each of the things listed
- A list of 5-10 people, places, or organizations you’d be thrilled to get attention from
Milestones for Social Media and Digital Communication Strategy

Check in with your volunteer at each of these milestones for two-way feedback. Make sure your volunteer is creating the social media campaign that you want, but also let them draw on their expertise and experience to suggest changes in the strategy, tools, content, etc.

Milestones include:

• Creation of all-over strategy
• Development of specific social media tools
• Development of guidelines for how and when to use each
• Assigning responsibility for the maintenance and updating of each tool to staff/volunteers
• Hand off of the campaign to the organization

However, because this skills-based volunteer will be speaking on behalf of your organization as they post to social media and send out other digital communications, you must ensure consistent staff monitoring of this content in addition to check-ins at milestones.

• A document outlining the social media strategy
• A list of all social media accounts, with usernames/passwords, and any expiration or renewal information
• Training materials specifying best practices for using each tool, for instance:
  - 1 Facebook post a day for 3 months
  - 1 blog post a week for 6 months
  - Instagram photos taken by direct service volunteers
For your project to be successful, your organization must be ready to take on the ongoing tasks of running their social media sites. You must find staff to manage each platform.

Ensure a safe, secure, and knowable place to store all the login and other information related to each social media tool.

Select a date to check in with the relevant staff members to assess the efficacy of the campaign. Are you achieving your goals? Are there unexpected benefits? Unexpected burdens?

Ask if your skilled volunteer is available for future review or updates. If not, assemble a list of other skilled volunteers who might be.

Thank your volunteer! Acknowledge their work at any or all upcoming launch parties, fundraisers, staff or board meetings. Ask your volunteer if they would like their name and contact information on the website, and for how long they would like to keep it up.
Example: Grant Writing

Successful grant writing can bring much-needed money and resources to your organization, and is a great way to involve skills-based volunteers in your organization’s work. The writing can be done off-site, and makes use of your volunteer’s strengths. If you have the groundwork in place, it can be completed in a reasonable timeframe.

Engaging a skilled volunteer through grant writing requires strong organizational readiness as well as project readiness. Because so much of grant writing is about the organization’s mission, vision, goals, and past successes, this all must be clearly articulated and known by all leadership, staff, and volunteers. Your skilled volunteer is expert in telling stories that show how your organization is set up to have significant social impact, but they need substantial material and support from you to be able to do so—they need to understand the world as you do.

Two important considerations:

1. Projects for skills-based volunteers are, ideally, not time sensitive; grants almost always have firm deadlines. Guard against disappointment by beginning the work well in advance, and understand that the grant still might not get completed by the time it is due. If the grant is absolutely essential to your organization, a paid grant writer is a safer choice.

2. There may be liability issues when volunteers have access to client information or financial statements beyond what is publicly available. Pay particular attention to the information about Sensitive information and liability concerns in Section C.
Understanding Grant Specifications

The grant itself will have clear specifications, which may include multiple components (written proposal, budgets, financial statements, contact information). Be clear what sections you would like the volunteer to address.

Set a deadline by which you would like the volunteer to complete the grant so that anyone in your organization who needs to approve it has time to do so.

Decide if you want the volunteer to also take care of the formatting and assembling all the pieces. Make sure the details of how to submit (electronically or hard-copy) and when to submit (and if that is a postmark or delivery date) are well understood. It is important that submitting the grant application should be done by a staff member, and not the volunteer.

Information To Provide Your Volunteer

Go through the grant specifications and highlight everything that it requests. Make a list and make sure you have information to provide your volunteer for each section.

Some of the information you are likely to require is listed below. It may be helpful to have a Word file, Google Doc, or even just an email with all this information that can be updated periodically for future skills-based volunteers to use (both for future grants, as well as other projects like website development, or fundraising campaigns or volunteer recruitment). It is divided into general organizational information and grant-specific information.

Organizational Information

- Mission statement/what we do
- Organizational vision
- History of your organization
- Statistics (number of programs offered, clients helped, meals served, etc.)
- Contact information and address(es)
- Staff bios, phone numbers, and emails
- Leadership bios
- Board member information
- List of partner organizations
- Organizational financial documents* (budget, revenues sources, audited financial statements, etc.)
- Proof of tax-exempt status*
- Logos (if you don’t have a logo, you may want to engage a different skills-based volunteer to create one)
Understanding Grant Specifications

- Good photographs of your programs and clients (if you don’t have a good, high-quality photos, you may want to recruit a skills-based volunteer to take some for you)
- Copies of previous successful (and unsuccessful) grants

* Note: Check for potential liability issues when sharing this information with a volunteer.

Grant-Specific Information

- The granting organization’s goals and priorities: the volunteer will need this to tailor the grant application.
- Statement of Needs. This includes the research that contextualizes your proposal or request for funds (i.e. statistics about hunger in your Borough or neighborhood to show why your food pantry needs funding).
- Information about the program for which you are writing the grant. This includes planning documents, client-facing program descriptions, flyers or emails advertising the program or project.
- Anything about the organization’s strategic objectives that can be used to help explain how this project also makes sense in terms of where the organization is intentionally heading.
- Information about the organization’s other programs/projects, especially those which have comparable impacts, outputs, or background processes.
- Program/project budget
- Project implementation plan
- Activity calendar and/or timeline
- Anticipated project outcomes
- Evaluation plan
- Project partners or advising organizations
- Contact person (staff member)
Milestones for Grant Writing

Even with meticulous pre-planning, grant writing is a collaborative project that will require a few iterations. Below is the list of phases the grant will likely go through—you and the volunteer must decide which milestones require check-ins, and what tasks will be done by the volunteer and which will be done by you or your organization. This process will move smoothly if the volunteer’s staff contact is consistent through the life of the project, and empowered to make decisions and provide requested information and clarification quickly.

Timeline and Tasks:

- Initial discussion of grant needs: deadline, scope, timeline, format, what the final project will look like, responsibility for submitting
- Outline
- First draft (includes likely request for additional information)
- Editing
- Gathering supplementary information
- Second draft
- Editing
- Near-final draft
- Adding any sensitive information not given to the volunteer
- Editing
- Proofreading (to be done by someone other than the grant-writer)
- Fact checking (to be done by organizational staff)
- Adding logos and/or letterhead
- Assembling
- Sending on time—to be done by a staff member, not the volunteer

Deliverables

Ensure that the volunteer provides you with the grant in an editable format so that it may be used as the basis for future grants (in addition to whatever hard copies or PDFs are produced). If they did any layout, have them provide you the layout files and all images and logos they used.
Post Project Plans for Grant Writing

- Set a date to follow up with the grant making organization (should that be required).
- File copies of the grant in accessible, known places for future reference.
- Thank your volunteer. Acknowledge their work at any or all upcoming launch parties, fundraisers, staff or board meetings. Ask if they would like their name and contact information on the website.
- Follow up with the volunteer when you hear back from the grant-making agency; let them know if the grant was successful or not.
Topic 15: Integrating Staff and Volunteers

Teamwork between volunteers and staff is key to the success of any organization. Effective organizational structure and infrastructure should always include and recognize the roles of volunteers, integrating volunteers into all functions of the organization. Volunteers can be involved with anything from program design and delivery to fundraising and management activities. Organizations that use a variety of volunteers in a wide range of positions (including providing pro bono services) are generally more effective than organizations that do not.

Best Practices:

• Make sure to involve staff members in developing volunteer roles and responsibilities, including reporting structures.
• Include volunteers in any visual representation of your organization. You could include them at the department level or on your overall organization chart.
• Ask both staff and volunteers to contribute to fundraising campaigns.
• Include volunteer contributions in your annual report. Your staff, donors, funders, and the public should be aware of how volunteers fit in to your organization and help you achieve your mission.
• Build morale and comradery by celebrating staff and volunteers together. When you have a staff celebration and don’t include volunteers, volunteers feel less valued. Conversely, if you only have an appreciation event for volunteers, your staff may feel unappreciated.
• Include management of volunteers in staff position descriptions and performance reviews. This ensures staff members take their volunteer management roles seriously from the start.
• Create a defined "career path" for volunteers, including a defined Board Development Strategy.
• Educate staff members who don’t manage volunteers about the importance of volunteers. Everyone from front-line employees to the executive committee has a responsibility to ensure that volunteers have a productive experience.

TIP:
Find information on Skilled and Pro Bono Volunteering at taprootfoundation.org.
Topic 16: Assessing Volunteer Costs and Benefits

Organizations can see many benefits from working with volunteers, but ensuring the program is worth the investment your organization is making is key to solidifying their value. Return on Investment, or ROI, refers to calculating the value of the outcome of your volunteer program as compared to the cost of the resources that allow the program to run.

Understanding the costs involved in volunteer management for your organization is an important component to developing your program, and helps demonstrate both to volunteers and funders the value of your volunteer program. A solid cost and benefit analysis can lead to improved and efficient internal processes, better communication with external audiences, and informed strategic planning as your organization grows and changes.

Best Practices:

• Take time to estimate the value of your volunteers’ service. Think about each volunteer assignment and what it would cost your organization to pay someone for the same service.

• Remember to take into account the level of skill involved in each volunteer role, since that might affect how much someone would be paid to perform the task.

• Consider the baseline rate for volunteer service per hour in your area. According to a 2013 study by Independent Sector, the value in New York is $26.45 per hour. (You can see the value for all 50 states by visiting independentsector.org.)

• Take into account all costs in your analysis, including the cost for volunteer recruitment posting, background checks, or specialized training.

• Include staff time in your calculation, incorporating any interaction your staff has with volunteers. This will not only help you calculate the cost of your volunteer program, but also enable you to identify ways to streamline your process.

• Be sure to look at the impact your volunteers have made and the benefit of having these volunteer roles for your organization. Benefits can include volunteer hours and longevity, impact on the community, and results of your specific programming.

• Research other organizations in your field to benchmark your results against theirs. What is the dollar value your sector places on a similar impact?

TIP:
Don’t keep the results to yourself. Communicate your findings with a wide audience, including staff at your organization, funders, volunteers, and the general public. Discussing the results will build support for your programming and give you the opportunity to streamline your process.
**Worksheet 1: Cost and Benefit Analysis**

1. List each input for your program, and the cost associated with that input. This can include staff time, management costs, supplies, or other expenses. Be as specific and you can, and use a separate sheet of paper, if you need additional space.

<table>
<thead>
<tr>
<th>Program Input</th>
<th>Cost of Input</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
</tr>
<tr>
<td><strong>Total Cost</strong></td>
<td></td>
</tr>
</tbody>
</table>

$________ is the total cost of my volunteer program.

2. List each output for your program and the value associated with that output. This can include hours of service, benefits to your clients, or in-kind donations. Be as specific as you can, and use a separate sheet of paper, if you need additional space.

<table>
<thead>
<tr>
<th>Program Output</th>
<th>Value of Output</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td></td>
</tr>
<tr>
<td><strong>Total Value</strong></td>
<td></td>
</tr>
</tbody>
</table>

$________ is the total value my volunteer program produces.

Cost and Benefit Calculation: $________ (output) / $________ (input) = $___________________

Therefore, for every $1 invested in your volunteer program, you can expect to see $_______ in value.

*(insert calculated total here)*
Topic 17: Understanding and Promoting the Benefits of Volunteering

Service to others is a hallmark of the American character. Today in the United States, 65 million Americans—27% of our population—volunteer their time, contributing eight billion service hours (50 hours per person) each year, valued at an impressive $175 billion dollars (Corporation for National and Community Service). Looking ahead, service and volunteerism can be central to how we as a nation meet the challenges facing communities in times of fiscal constraints and growing individual needs.

Volunteer service is a triple win, offering a trifecta of benefits to the community, the recipients of the service, and the volunteers themselves. With more volunteers, we can leverage service to impact the critical issues of our time.

**Volunteers make a difference to the community and the world**
- Youth service prepares youth and adults to become active citizens and take leadership roles in finding solutions to community challenges (Educational Horizons, 2002).
- Youth service and service learning result in a 40% lower risk of academic failure, school suspension, or teen pregnancy (Child Development, 1997).
- Volunteer service impacts the critical issues facing our city such as education, economic justice, public health, environment, and emergency response.
- Older volunteers meet a wide range of community needs - helping seniors live independently in their homes, tutoring and mentoring at-risk youth, providing financial education and job training to veterans and their families, and helping communities recover from disasters (The Corporation for National and Community Service).

**Volunteers connect to other people**
- Volunteering improves self-confidence, self-esteem, and social skills.
- Volunteers build expanded networks of friends and social connections or social capital.

**Volunteers improve their health and life expectancy**
- Volunteers who serve 100 hours or more per year (two hours per week) report less pain, less heart disease, less ill health, and less depression.
- Volunteers are 30% less likely to report poor health than non-volunteers (Journal of Health and Social Benefit, 2002).
- Volunteers are 16% less likely than non-volunteers to die before age 70. Those who volunteer for five years or more are 44% less likely to die by age 70 (CNCS Health Benefits of Volunteering; America's Changing Lives, Longitudinal Study of Aging, 2007).
- Older Americans who volunteer frequently live longer and report less disability (The Corporation for National and Community Service, 2010).

**Volunteers advance their knowledge and careers**
- Volunteers learn new things and develop new marketable skills.
- Volunteers are 27% more likely to find a job after being out of work than non-volunteers. Those volunteers who do not have a high school diploma are 51% more likely to find a job than their non-volunteering counterparts.
Volunteers give and, in return, get joy, life satisfaction, and fulfillment

- Volunteers who serve monthly are, on average, 7% happier than non-volunteers; those who serve bimonthly are 12% happier; and those who serve weekly are 16% happier (Harvard Health Publications, 2013).
- Volunteers can share their talents and hobbies with others.
- The gift of time and talent serving others is exciting and returns the gift of joy.
Strategically engaging volunteers in service to your organization will not only help you meet your mission, but will also build the capacity of your organization as a whole. Research in the sector has proven that organizations with strong volunteer management programs are better managed and led, more adaptable and sustainable, better prepared to scale their work, and stronger nonprofits overall. In addition, these nonprofits have strong and well-developed human resources management practices, and operate at almost half the median budget as their peer organizations.*

There are a number of steps your organization can take to work toward strategic management of volunteers, so you can begin to see the rewards in every aspect of your organization’s management and function.

**Best Practices:**

- Volunteer roles must be carefully planned to match your organization’s strategic goals and priorities. If volunteers are not providing mission-critical service, those roles should be carefully evaluated to determine their benefit to the organization.

- Plan volunteer roles with careful consideration to the needs of the organization, as opposed to placing volunteers ad hoc based on their skills and availability. While it is important to consider what volunteers have to offer, this should not be the determining factor in deciding an organization’s volunteer roles.

- Volunteer management is an art as well as a science that requires time, money and resources from your organization to make them successful and effective.

- Organizational leadership must believe in strong volunteer management and support it from the top down.

- Make volunteers feel invested in your organization and its mission. Strategic volunteer management is more than just volunteer matching— it’s making the volunteers see the impact of their work and feel as though they are making a difference.

- Think about the big picture. Don’t focus on specific volunteer tasks, but about the broader ways volunteers can serve your organization.

- Consider a variety of volunteer types and levels of engagement, including episodic volunteers, committed volunteers and skills-based or pro bono volunteers. Each type of volunteer can provide meaningful service that will further your organization’s mission, based on your needs and the structure of your programming.

*TIP:

For additional information, visit [http://www.pointsoflight.org/service-enterprise-initiative](http://www.pointsoflight.org/service-enterprise-initiative)
Worksheet 1: Developing Your Pitch

Imagine you are going to present at a meeting with the ED and other Senior Staff about the importance of using volunteers strategically at your organization, and what your organization can do to maximize its work with volunteers. Use this worksheet to guide you in developing your talking points.

I. Make It Compelling
What are your organization’s strategic goals and priorities? What is the benefit of using volunteers to meet these goals and priorities? What is the most compelling argument for how volunteers can help increase your organization’s capacity to execute mission-critical work?

II. Address The Challenge
What are the existing challenges your organization faces? How can a strong volunteer program address these challenges?

III. Be Inclusive
How do you want staff, constituents and other stakeholders to be involved in making changes? How will you ensure that everyone can work collaboratively to explore how volunteers can meet the organization’s strategic goals and priorities?

IV. Offer A Solution
What needs to happen in order for your organization to use volunteers more strategically? What obstacles are in the way?
Asset mapping is an important community-based tool to support communities in building on their skills and their own capacity to address their pressing needs. An asset map will identify individuals, associations and institutions within the community and detail what they have to offer and how best to leverage their assets to better serve the community. By leading your efforts with an asset map, you’ll be better prepared to partner with the community, and tap into the assets they have to support your efforts.

Focusing on assets allows you to build on what the community has and support their efforts to create change. In contrast, looking only at needs assumes that outside resources are the only way to provide support to communities, and does not provide individuals with an outlet to be active participants in the support of their community.

**Best Practices:**

- Take a tour of the community, with a keen eye on what resources are available. Walk the streets, meet residents, visit places of interest, and eat at local restaurants. Get a feel for the community so you can partner with them to identify and address their needs.

- Consider places of interest, such as community centers, churches, unemployment offices, schools, libraries, colleges and universities. Look at the services they currently offer, and think strategically about how you can partner with them to support community-driven solutions.

- Identify key stakeholders, as you will need their valuable inputs and support to continue your efforts. Talk to school principals, active community members, elected officials, and small business owners to help focus your efforts.

- Develop a physical map of the community, listing assets and noting ways that your services can connect with those assets to provide programming and community support.

- Keep the focus of your asset map on what the community has to offer. Remember, asset-based assessment looks within the community and builds on what they have in an effort to meet their needs.

- Be an ally for the community’s active participation in the process. Make sure community members understand you want to be a part of the solution, but that you recognize you are not the only piece. It takes organizations, community members and leaders, as well as key stakeholders coming together to drive community change.

**TIP:**

Keep your asset map as a living document. Visit the places in the community frequently, so you can note any changes and have an up-to-date map of community resources.
Worksheet: Questions To Ask When Starting An Asset Mapping Project

What is the size of your community?

What work is required to support the community?

Who is already doing the work? What are their needs to successfully expand this work?

How much time is there for the task?

How much money is at our disposal?

What does the neighborhood want to accomplish? What role could our organization have in helping them reach this goal?

Who is this most going to help?

How will the results benefit the community? How will the work contribute to growth, innovation or progress in the community?
Topic 20: Neighboring: Building Strong Communities From Within

Neighboring, or the concept of residents strengthening their own communities through community support and volunteer service, is a powerful tool in building a stronger city. Engaging volunteers effectively and strategically is a benefit to the community, and stronger communities are the ones that actively play a role in the volunteer process.

In 2017, NYC Service conducted a neighborhood study to better understand volunteer service in local communities and it revealed some interesting findings. Overall, the study suggests that NYC residents are engaging at high levels with causes in which they believe or to which they personally connect. A focus on developing neighborhood volunteer networks creates stronger, more resilient communities throughout the city – a benefit to us all. As a nonprofit, you can further engage in creating thriving and sustainable communities by making it a mission to collaborate with local volunteers on shared goals and a collective vision for the community.

Supporting community volunteering is a team effort. Work closely with existing local volunteers, local elected officials, and other neighborhood stakeholders in creating volunteer programming and civic engagement opportunities that are of interest to local residents and meet the needs of the community.

Best Practices:

- Identify community champions who can serve as a bridge between your organization and the community. This might be a local community center, school or house of worship. Local institutions are trusted by the community, so their assistance in building support for your programming will be crucial to your success.

- If you are not from or do not live in the community you are serving, understand your position as an outsider and learn the needs of the community from residents and volunteers. Building support for your program is about tailoring your program to fit the needs of the organization rather than proactively identifying the community’s needs and attempting to provide a solution.

- Complete an asset map (see Topic 19 - Community Assessment Through Asset Mapping) to determine what the neighborhood has to offer and what local support you can build. Use the worksheet in this section to guide conversations with houses of worship, community centers, schools, local businesses and others to build support in the community and resources for your community-based programs.

- Think beyond the traditional definition of volunteering when recruiting and engaging community members for local volunteer opportunities. Oftentimes, community members are already volunteering with local institutions – including schools and houses of worship – or independently giving their time to help or support neighbors. Connect and cultivate relationships with local stakeholder groups to help you engage local residents in volunteer opportunities with your programs. Be sure to highlight how your volunteer opportunities connect to local issues and concerns, as residents are likely to engage in something that impacts their everyday experience (or something they themselves have experienced).

- Seek to meet needs that are specific to the community you are working in. Not every approach will be right for every community, and not every type of service will be needed within the community. Local volunteers will connect to service opportunities that they see influencing their own lives. Treat each community you work in as you would each unique volunteer you work with, and work to understand the local issues people in the neighborhood care about before reaching out to residents you have not engaged in the past.

- Address the barriers residents may have to volunteering with your program. Each barrier is also unique to each community, but volunteers across the board often cite lack of time as the biggest barrier to volunteering. As much as possible, create opportunities that offer flexibility and actively seek feedback from community volunteers about what opportunities fit into their schedule. Think about barriers to service for your potential volunteers...
pool of volunteers – timing of opportunities, the need for childcare, a lack of family-friendly volunteer opportunities, projects conducted only in English, to name a few – and try to build in practices that support volunteers with dynamic needs and lives.

- Make your opportunities within the community known. Residents have often expressed that finding local and meaningful opportunities is difficult, even when they want to give back. Make sure to develop strategies to communicate with local residents and recruit volunteers from the communities you serve. If you do not provide opportunities that match a potential volunteer’s interest, have a list of partner organizations in the area so they can find another way to engage in their community.

TIP: To read NYC Service’s NY Civic Engagement: Neighborhood Volunteer Study & Plan visit nyc.gov/neighborhoodvolunteers.
Worksheet: Assess Your Neighborhood Civic Engagement Readiness

Use this worksheet to create a neighborhood profile and assess your readiness to begin engaging local volunteers.

1. What are the demographics of the neighborhood?

2. What languages are spoken here?

3. Who are your local stakeholders (both formal and informal) that can help you further assess needs and recruit volunteers?

4. What specific needs have you seen or have been expressed to you by the residents?

5. How does your organization currently support this neighborhood?

6. What programs can you offer to volunteers in this neighborhood?

7. Are you able to support programming in this neighborhood? (i.e. Do you have local staff that can assist? Are you able to support the language needs of the neighborhood?)
**Worksheet: Neighborhood Assessment for Neighboring initiatives**

Use this worksheet to develop an understanding of the neighborhood you are looking to grow volunteer programming in. Consider how each aspect of the community can build support for your organization’s efforts.

<table>
<thead>
<tr>
<th>Community Based Organizations</th>
<th>Name</th>
<th>Contact Person</th>
<th>Does our organization have a pre-established relationship with them?</th>
<th>What needs in the community do they identify?</th>
<th>Do they support our organization’s efforts in the community? Why/why not?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Churches</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Local Schools</td>
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<td>Local Community Centers</td>
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<td>Local Businesses</td>
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<tr>
<td>Other Local Organizations</td>
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A diverse volunteer base is a crucial part of a successful volunteer program. A diverse volunteer program is more likely to reflect the community it serves and bring a variety of cultural and life perspectives to an organization. When thinking through how you build a diverse volunteer base, it is critical you not only consider diversity, but equity and inclusion as well. First, diversity refers to the varied social and cultural composition of a group based on factors including race, ethnicity, class, language, religion gender, sexual orientation, etc. Second, equity refers to inclusion and access to power, resources, positive rewards or opportunities among all members of a society or a diverse group of people regardless of race or ethnicity, with a specific focus on fair treatment for racial groups traditionally marginalized and discriminated against or historically disenfranchised. Lastly, inclusion refers to the process and practice of bringing and engaging traditionally excluded or marginalized individuals and/or groups into organizational or institutional processes, activities, decision-making and/or policy-making.¹

**Best Practices:**

- Evaluate your internal DEI practices and build support to mobilize change. Consider what a DEI perspective will add to your organization as well as your volunteer program.
- Ensure your organization has proper organizational infrastructure and capacity in place to support DEI practices that get implemented (e.g. if your organization wishes to translate an application into other languages, make sure there is staff or other volunteers that speak, write, and read those languages to review these applications.
- Define success by designing achievable goals around your strategic DEI priorities.
- Work to align DEI efforts for your volunteer program with the overall strategic priorities of your organization.
- Use common diversity, equity and inclusion language with leadership, staff, and your volunteers. Socialize the use of terms with all groups so that there is a common understanding.
- Build relationships within your community to develop a holistic understanding of the individuals your organization serves.
- Incorporate DEI practices into your volunteer management process by identifying your current volunteer audience, and considering best practices in the recruitment, management, support, and recognition of your volunteers.
- Develop partnerships that will assist your organization in building support for DEI efforts and potentially provide resources and deeper networks for volunteers as a result of serving with your organization.
- Identify barriers to entry within your volunteer program, including income, access to technology, geography, etc., and develop a plan to support potential volunteers who identify with these barriers.

Worksheet: Develop Diversity, Equity and Inclusion Strategies

Working with a team within your organization, define the following for your organization:

**Diversity:**

**Equity:**

**Inclusion:**

What is the value of a DEI initiative to your organization?

What barriers might new volunteer groups you are trying to recruit encounter with your organization?

How can your organization be flexible in accommodating these volunteers? What volunteer management practices might you change to remove these barriers?
# Worksheet: Diversity, Equity, and Inclusion within Volunteer Engagement: Organizational Assessment

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<thead>
<tr>
<th></th>
<th>Yes</th>
<th>Somewhat/Room for Improvement</th>
<th>No</th>
<th>Unsure</th>
<th>Notes</th>
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<tbody>
<tr>
<td><strong>Strategic Volunteer Planning</strong></td>
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<tr>
<td>My organization has a shared understanding of the meaning of diversity, equity, and inclusion.</td>
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<td>My organization has a clear, common vision of what our DEI goals are within volunteer engagement.</td>
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<td><strong>Recruitment and Outreach</strong></td>
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<td>My organization uses a variety of recruitment tactics – Online: websites, email, newsletters, social media, blogs Offline: traditional media (TV, radio, newspapers), local media outlets, libraries, community centers, clients</td>
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<td>My organization actively seeks out a diverse group of volunteers by recruiting in a variety of locations.</td>
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<td>My organization offers recruitment material in a variety of languages.</td>
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<td><strong>Onboarding</strong></td>
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<td>My organization uses inclusive language on all onboarding paperwork.</td>
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<td>My organization has clear and transparent background check processes that are shared with prospective volunteers.</td>
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<td>My organization addresses barriers to entry involved in the background check or onboarding process.</td>
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<td><strong>Supervision</strong></td>
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<td>My organization provides staff training on working with diverse populations.</td>
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<td>My organization includes training for volunteers on working with diverse cultures.</td>
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<td>My organization provides specialized training for volunteers who lead other volunteers, to ensure they abide by the organization’s DEI philosophy.</td>
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Appendix: Volunteer Management Resources

**Corporation for National and Community Service**
The Corporation for National and Community Service is a federal agency that engages more than five million Americans in service through Senior Corps, AmeriCorps, and Learn and Serve America. For information about seniors, read their report *Keeping Baby Boomers Volunteering: A Research Brief on Volunteer Retention and Turnover.*
[nationalserviceresources.org](http://nationalserviceresources.org)

**Energize, Inc**
Leaving website for all things volunteer. Articles, templates, resources, courses are all in one spot.
[energizeinc.com/art.html](http://energizeinc.com/art.html)

**HandsOn Network**
Great resources on volunteer management and recruitment, including a volunteer hour's calculator that allows nonprofits to accurately value the time volunteers donate.
[handsonnetwork.org](http://handsonnetwork.org)

**Idealist.org**
Great for posting jobs, volunteer opportunities and for volunteer management resources.
[idealist.org/info/VolunteerMgmt](http://idealist.org/info/VolunteerMgmt)

**Points of Light Foundation**
Points of Light provides research, analysis, tools and training to support the creation and management of volunteer programs.
[pointsoflight.org/ideas-and-insights](http://pointsoflight.org/ideas-and-insights)

**Sparked.com**
Online volunteering site – nonprofits can post small online tasks for volunteers to complete. Great for updating documents, managing spreadsheets and generating fundraising ideas.
[sparked.com](http://sparked.com)

**Volunteer Match**
Good for advertising for volunteers and has good management resources.
[ideaencore.com/collection/VolunteerMatch](http://ideaencore.com/collection/VolunteerMatch)

**Lawyers Alliance for New York**
Lawyers Alliance for New York is the leading provider of business and transactional legal services for nonprofit organizations that are improving the quality of life in New York City neighborhoods. Great resource for connecting with legal advice and workshops. Many services provided free.
[lawyersalliance.org](http://lawyersalliance.org)

**New York Association of Volunteer Administrators**
NYAVA is a membership organization dedicated to promoting professionalism and leadership in volunteerism in the New York City area, offering volunteer management training by experienced volunteer administrators.
[nyava.org](http://nyava.org)
Nonprofit New York
The goal of the Nonprofit New York is to help nonprofits meet common challenges and problems, to serve as a meeting ground, and to strengthen the nonprofit sector as a whole.

nonprofitnewyork.org

NPowerny
NPowerny is a national nonprofit providing IT training and services to nonprofits and young adults.

npowerny.org

NTEN
NTEN is a membership-based non-profit technology hub for assisting nonprofits in meeting their everyday technology needs and using technology effectively. Provides trainings, workshops and handout resources for technology opportunities.

nten.org

The Foundation Center
The Foundation Center is the leading source of information about philanthropy worldwide. Visit the 5th Avenue location and use the free resources, or use the online Foundation Finder, a free, searchable, look-up tool providing contact information and basic fiscal profiles for US private and community foundations. Reference library, online newsletters, classes.

foundationcenter.org/newyork

The Support Center for Nonprofit Management
The Support Center provides nonprofit management training and consulting, volunteer management workshops, information and practical resources, and works to build strategic alliances.

supportcenteronline.org
For Your Consideration

Volunteer management systems are continuously evolving as new tools and practices emerge from the field. If you have ideas or tips to be included in our next version, please contact training@newyorkcares.org with the subject line “GVMS Suggestion.”

For more information about New York Cares volunteer management trainings, visit newyorkcares.org/trainings-we-offer.

For more information about NYC Service, visit nyc.gov/service.

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Thank you for your service.
Thank you for your service!