



Recruiting, Managing, and Retaining Volunteers

By Mark Lindemann and Dionne A. Rowe

According to the Corporation for National and Community Service, about 64.3 million Americans, or more than a quarter of the adult population, volunteer their time for nonprofit organizations. Most organizations are heavily dependent on volunteer help. However, many volunteers become discouraged if they aren't respected, aren't included or valued in the ways staff members are, are given tasks that aren't suitable for their skills and experience, and in general aren't in the flow of information or activity.

Yet volunteers are the lifeblood of many of the organizations for whom *Successful Fundraising* is written. In order to help Adventist organizations maximize this wonderful resource, we offer these suggestions on recruiting, retaining and managing volunteers. At the end of this chapter is a very important section that addresses the legal issues of volunteer management.

There are many ways to utilize volunteer help. For the purposes of *Successful Fundraising*, we will focus mainly on the fundraising aspect of an organization, although of course volunteers can be extremely helpful in many ways that also support fundraising, such as being advocates for the organization, conducting events, preparing written materials, or simply helping with customer relations and outreach.

Building your Volunteer Corps

Step #1.

Identify your volunteer needs. What tasks need to be accomplished? What skills are needed for those tasks? Develop a mini-job description that outlines these items and can be used when moving to the next step.

Step #2.

Identify and invite potential volunteers. They can be anyone who has an interest in the organization.

Step #3.

Interview potential volunteers. Ask about their interests, why the person would like to be involved, what assignments and responsibilities have they enjoyed, and what would be fulfilling for the potential volunteer. Allow plenty of time for a volunteer to explore the possibilities and ask questions.

Step #4.

Match the volunteer qualifications, experience, qualities and interests with the jobs and tasks you identified in Step #1. Challenge them with interesting and useful work, ensuring they will see the results of their efforts, will be involved, and will have a voice in the organization and their work.

Step #5.

If there is staff, train the staff, inform them thoroughly of what the volunteer will do, ensure that staff respects and appropriately involves volunteers.

Step #6.

Acknowledge and recognize volunteer work. Even if the entire team is volunteering, the lead person should ensure that the above steps are in place and culminate with appropriate appreciation.

Step #7.

Hang on to the volunteers! Retain their services by good management practices. As a leader you should manage volunteers the same as you would use best practices in managing paid staff. Responsibilities should be clear, skills should be matched to the job, provide adequate instruction and support, acknowledge their knowledge and experience, make sure there are mutual expectations, and that there is enough information about the organization in general.

Motivating Volunteers

What makes a volunteer want to do his or her best for the organization and the assignment? For many it's a commitment to the organization, the desire to help a cause in which one believes. However, there are many other reasons why volunteers become engaged. We can use the following motivators to help volunteers work at their maximum potential and usefulness.

- The chance to use skills that they have acquired.
- The chance to acquire skills which may even lead to a permanent job in some organization.
- Belief in the cause.
- The opportunity to work in an environment that's different from a regular workplace, but in which the volunteer has much interest.
- The chance to gain experience and get better at what they are doing.
- The opportunity to gain confidence and respect from others.
- Ultimately—to make a difference and accomplish something meaningful.
- And let's not forget enjoyment and fun!

Under what conditions do volunteers work best?

- When there is a degree of autonomy—the opportunity to not just follow the instructions and guidelines of the task but to also be able to direct their work to some degree.
- When there is a clear purpose to what the volunteer is doing, when there is a clear connection to the larger picture or plan, and a clear expectation of outcomes.
- When their particular skills and talents are acknowledged and utilized.
- When there is enough training and orientation to the task and the organization so that the volunteer feels and is competent, but not so much that the volunteer feels demeaned and gets disinterested.
- When they have a chance to give feedback and make recommendations. There should be a job description, mutual expectations, and policies so that volunteers know what the boundaries are.

Volunteers and Fundraising

The range of tasks that a volunteer can do is very broad. First, the volunteers might be involved in the actual planning of a fundraising program, project or campaign. Second, volunteers can serve as committee chairs or members. A carefully-selected group of volunteers can serve as a steering committee for a campaign, working alongside staff (as in a school and other nonprofits). Third, volunteers can help identify, cultivate and solicit donors. Fourth, if a volunteer is hesitant about personal solicitation, he or she can utilize skills and talents that fit the campaign plan; e.g., writing a proposal, working with social media, writing solicitation letters, planning and carrying out an event, saying or writing thank you notes, keeping records, serving as an advocate to the community, and many other tasks that fit into the campaign plan.

As in general volunteer management, roles and responsibilities should be clearly outlined, written out, and distributed appropriately. (Sample roles and responsibilities documents can be provided by PSI—please contact us).

Above all, clear mutual expectations should be determined, along with the expectations of accountability, timeliness, appropriate reporting to a committee and chair. It may be necessary to have someone outside of the organization or team do some coaching and training (again, PSI can assist with this activity).

Value of Volunteers

Volunteer involvement can be beneficial to securing funding because this shows buy-in, taking of responsibility, and “family” support for fundraising. Donors often inquire what the organization is doing for itself, and use of volunteers can provide credibility.

In proving the value of volunteers, it’s advisable to track how many volunteers provide what kinds of services and how many hours this involves. This information can be translated into dollar values, particularly if volunteers with certain expertise that would have to be bought are providing their services.



The Legal Aspects of Volunteer Management (from Dionne A. Rowe)

While volunteers may help perform tasks in the workplace like employees, they differ from employees in one very significant way. The U.S. Department of Labor says that a volunteer is “an individual who performs hours of service. . . for civic, charitable or humanitarian reasons, without promise, expectation or receipt of compensation for services rendered.” This means that volunteers help out from the goodness of their heart (or some other reason), but for free. If volunteers are going to receive any money, the organization will then need to determine if that money becomes taxable income to the volunteer and whether that money will transform the volunteer into an employee. Payment may then trigger the need for the organization to comply with federal and state wage and hour laws, and may raise unnecessary and unwanted legal exposure for the organization.

Like employees, volunteers can engage in conduct for which the employer can be found responsible. The legal doctrine is called “respondeat superior” and it means that an employer can be liable for the torts committed by an employee (or volunteer) acting within the scope of his/her employment (or volunteer) duties under certain circumstances. The more responsibility a volunteer has, the greater the potential liability, so an organization needs to be very careful in the selection of volunteers.

A good way to do this is to have a documented process for engaging volunteers that incorporates various components. A volunteer application that is specifically tailored to the position is the most basic necessity. For example, if the organization is recruiting a volunteer to seal envelopes, a detailed application is unnecessary and simple references may be sufficient. However, if the volunteer will work with children, a far more detailed application is needed, and a background check should be a standard practice (also advised when volunteers will be working with the elderly). The volunteer process should also include a volunteer position description that details the expectations of the position as well as the authority that the volunteer will have. It is also a good idea to create a volunteer handbook or manual that contains written policies that apply solely to volunteers. All of the policies, procedures and processes relating to the recruiting and engaging volunteers should always be in writing. Volunteers should also perform work that is separate from and different than the work performed by employees.

Supervision is also significant when working with volunteers. The organization needs to make sure the volunteer has an appropriate level of supervision for their assigned tasks. If performance issues or other negative issues relating to a volunteer’s conduct arise, the organization needs to be aware that the volunteer can and should be terminated, particularly if the volunteer’s behavior puts the organization at risk.

Workplace safety is an issue that impacts volunteers. A volunteer injured in performing their work may be covered by worker’s compensation. Coverage if any, will be determined by the law of the state where the organization operates. It is an overall best practice to follow all applicable Occupational Safety and Health Administration (“OSHA”) regulations, which exist to try and ensure safe workplaces for everyone. Organizations need to know what guidelines apply, follow them and train volunteers as applicable.

Safety concerns will follow the volunteer even when they leave the organization’s premises. If volunteers are going to go out into the community, sending volunteers in pairs can help to

keep them safe. Volunteers should also be notified of the potential dangers of their work, if applicable, and if hazards exist, the organization may want to have the volunteer sign a waiver and general release indicating that they understand the risk of their position and that they release the organization from liability for any harm that may result from carrying out their work. If the organization has insurance coverage, there may also be policies that are available specifically to cover volunteers in performance of their duties or in travel they take on behalf of the organization.

If the organization has legal questions about volunteers in the workplace, hiring a lawyer licensed in the jurisdiction where the organization operates is the safest and best route to take.

