

Business Planning Tools for Non-Profit Organizations – Second Edition

Including New Section: *Volunteerism – A Valuable Strategic Asset*



SCORE®

Counselors to America's Small Business

Dear Non-Profit Leaders,

We are very pleased to provide you with *Business Planning Tools for Non-Profits – Second Edition*, which incorporates an important new resource: *Volunteerism – A Valuable Strategic Asset*. This new, expanded edition of our initial guidebook represents the second phase of an initiative by SCORE and The Office Depot Foundation to assist non-profit organizations in building their capacity to serve their communities.

This *Second Edition* has been funded by The Office Depot Foundation in collaboration with The SCORE Foundation. We continue to appreciate the financial support of the *W. K. Kellogg Foundation* and the willingness of a number of other non-profit organizations to let SCORE incorporate their ideas and materials in our resource materials. We are also grateful to the Serve Illinois Commission of the Illinois Department of Human Services Division of Community Health and Prevention for permitting SCORE and The SCORE Foundation to utilize its ideas and content in our resource materials.

Volunteers represent a significant asset in non-profit organizations. But too often, this asset is not factored into the overall strategic or business planning process of an organization. Whether it is programmatic, financial or strategic, a volunteer program has an impact on both the success and the challenges of any charity. Incorporating this key component into your overall business planning model will provide invaluable benefits.

The volunteerism information in this guidebook represents a natural extension of the Business Planning Tools for Non-Profits materials you will find in the first section. It is our hope that this expanded publication will assist your board, staff and volunteers in strengthening your organization and fully realizing your vision of service to your community.

Sincerely,

Mark J. Dobosz
Executive Director/Editor
The SCORE Foundation

Business Planning Tools for Non-Profit Organizations Second Edition

Including
Volunteerism – A Valuable Strategic Asset



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Business Planning Tools
for Non-Profit Organizations
Section 1

SCORE and this guide

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SCORE is a 45-year-old national non-profit organization with more than 12,400 volunteers who provide free business mentoring and no- or low-cost educational workshops to new and emerging small businesses. In 2009, SCORE counselors volunteered over 1,000,000 hours in mentoring and workshop services. SCORE grows successful small businesses across America one business at a time!

While most of SCORE's work has focused on small businesses, over the years it has assisted some start-up and emerging non-profit organizations, particularly on business issues. As a result of these experiences, SCORE strongly believes that to be effective, competitive and sustainable, non-profits must not only be caring and creative, they must run their operations as businesses.

This guide is about a great American institution and a powerful agent for change: the non-profit charitable organization.

In our democratic society, we ask non-profit organizations to fulfill several important responsibilities, from providing public benefit and serving the underprivileged to advancing education and science and reducing the burden of government. We also expect non-profits to operate on a higher, more noble plane than other organizations, and we

insist that they focus on public good rather than private gain in accomplishing their goals.

The role of this so-called “third sector” of our economy has become a vital part of our national culture. Non-profits have proven to be effective instruments for addressing social needs outside of government. To perform effectively, however, they must be free to take risks, try new approaches and invest in solutions as they see fit. This means developing the strategies and skills to build the capacities to serve their communities, to become self-sufficient and to compete for resources needed to achieve their missions.

Without financial self-sufficiency, non-profit organizations cannot choose their direction or concentrate on their mission. Instead, they remain subject to the demands of finding their funding sources and in turn meeting donor demands.

As a result, in today's world, financial self-sufficiency is nothing less than a critical requirement for non-profit organizations and, together with strategic planning and marketing, their highest priority. To secure ongoing resources free from constraints imposed from the outside, non-profits must pursue a long-term planning process. and use business tools to assist them.



Society believes non-profit organizations are important because they provide a public benefit.

DIVERSITY OF NON-PROFITS

Charities, foundations, social welfare organizations, and professional and trade associations are the major categories of non-profit organizations.

National non-profit size and scope

- Charities (501(c)(3) organizations): 654,000
- Social welfare organizations (501(c)(4) organizations): 140,000
- Religious organizations: 341,000
- Total independent sector organizations: 1.14 million

Revenues

- Total independent sector revenues: \$621.4 billion
- Percentage of the national economy: 6.2 percent

Employment

- Independent sector employees: 10.2 million
- Percentage of total U.S. workforce: 6.9 percent

(Source: Givingforum.org)

Non-profit organizations also receive support in the form of cash or in-kind services through grants and contracts from government agencies or foundations, contributions from individuals and businesses and earned income from fee-for-service activity, investments and other ventures. Charitable giving represents the major funding mechanism for non-profits outside of government. Of all charitable giving in 2008, approximately 75 percent was contributed by individuals. Non-profit income from private foundations, estates, bequests and corporate donations rank second, third and fourth respectively, and together amounted to approximately 25 percent of total charitable giving.

Patterns of charitable giving change over time. Overall contributions increased in 2008 to \$307 billion.

Other statistics help to paint a picture of the giving population: Those who contribute time to a charity are three times more likely than non-volunteers to contribute cash as well, and approximately 75 percent of those who volunteer as children will go on to do so as adults.

Besides funding from individual donors, estates, private foundations and corporations, non-profit organizations also raise funds through membership fees and fee-for-service arrangements (which involve charging clients a portion of the cost of services). These activities can result in earning excess income and, while the trend towards income-producing opportunities is increasing, research to quantify it is still in its early stages.



STRATEGIC PLANS, BUSINESS PLANS AND FEASIBILITY STUDIES

Before we can begin to plan and operate an organization, we must understand how to use the strategic plan, business plan and feasibility study together. We must also clearly understand what we mean by vision, values and mission, since these concepts are key to the organization's ability to define its direction:

Strategy

The art and science of planning and directing large-scale operations; a careful plan or method.

Business Plan

A diagram or scheme detailing the time, attention and labor of people for the purpose of income improvement.

Feasibility Study

A practical, reasonable and probable process for closely examining a subject, with the aim of determining how readily it can be performed or executed.

Vision

An idea or scheme marked by foresight; a mental image, a dream. A vision motivates individuals towards shared long-term goals.

Values

Standards or principles regarded as desirable or worthwhile; highly thought of, esteemed. Values constitute the essence of an organization's personality and identity.

Mission

The special task or purpose for which an organization is destined to perform.

*Note to new and emerging non-profit organizations:
The following discussions on strategic and business plans and on feasibility studies may lead to the conclusion that such plans must be long and overly complex. However, this is not true for new and emerging organizations. The value of the planning process is the thoughtful, fact-based analysis that it requires and the clear direction it provides. A written plan or study for a relatively new organization need not be more than 15 pages long.*

Equipped with these concepts, we can begin to understand how to develop each of the planning processes.

IMPORTANCE OF A STRATEGIC PLAN

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The strategic planning process has its origins in the military. It was (and is) used to anticipate enemy activity and to plan the strategies to win battles. From a management perspective, strategic planning is designed to accomplish a similar result. Given the organization's vision, values and mission, the strategic plan:

- Provides a tool for anticipating the external environment, including competition, trends, client needs, legislative and regulatory changes
- Helps to dictate a course of action or direction for the future
- Guides the organization's leaders
- Articulates the broad parameters under which the organization will operate for the next several years

Clearly, an organization's policy regarding financial self-sufficiency should be articulated and highlighted in its strategic plan. Because the strategic planning process provides a systematic way for an organization to express its vision, describe its values and state its mission, it inspires a process of analyzing and anticipating the effects of change. Developing scenarios that reflect alternative courses of action is a crucial part of this process.

Strategic planning is usually accomplished by a team comprising the community as well as board members, management and employees. The process typically takes one to three months and culminates in a strategic plan that establishes the framework for leading the organization.

The strategic planning process provides a systematic way for an organization to express its vision, describe its values and state its mission.

Developing a strategic plan also involves several levels of organization. The following steps will help you to begin:

- 1.** Develop several planning teams composed of employees, board members, community leaders, sponsors and management. Outline the planning process, including expectations and time lines.
- 2.** Gather pertinent information, including the organization's articles of incorporation (a good refresher on the organization's stated purpose), historical organizational performance, summary of current programs and services, changes in legislative and regulatory policies, demographic and industry trends and articles or reports that present innovations within your industry.
- 3.** Develop or reaffirm the organization's vision and mission. Establish its values and guiding principles. Define how it should behave as well as its reason for being and operational framework.

- 4.** Objectively assess the organization's competitive position, strengths, weaknesses and critical assets (especially its employee skills), potential threats, technology and market position.
- 5.** Assess and analyze external changes in the industry as well as the political, economic and community environment based on an information-gathering process and planning group expertise.
- 6.** Using these steps, develop various course scenarios, determine the organization's optimal direction and establish strategic goals.
- 7.** Identify any additional needed resources and financial options, and finalize the written strategic plan.

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IMPORTANCE OF THE BUSINESS PLAN

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Traditionally, business plans have been a focus of the for-profit sector; however, they are equally valuable as a tool for non-profit organizations.

For the non-profit, the business plan can be considered a management tool that will steadily guide your organization through a changing environment. The business plan articulates what your organization does and how it will be managed. It clearly defines the organization's goals and objectives and provides a mechanism for monitoring and evaluating progress.

The business plan should be developed after the organization has completed its strategic plan. The business plan is a management tool for:

- Articulating specific goals and objectives
- Promoting efficiencies
- Identifying opportunities for improvement
- Establishing performance guidelines
- Raising funds
- Guiding the implementation of capacity-building strategies

Business plans are usually updated annually if not twice a year, or whenever new program and funding opportunities arise. (Typically, an organization should first determine whether to proceed with a new venture by conducting a feasibility study.) Once the board and management approve a new program, it should be included in an updated version of the business plan.

Because the business plan is a detailed account of how the organization will operate, it becomes the key document for investors, or donors, when soliciting financing, funding or major contributions. Therefore, the business plan should promote the organization's capacity and should be viewed as a major communications tool.

Remember, too, that one plan does not fit all. A business plan should be written to meet the needs of a specific audience. If you are using the business plan to solicit financing from a bank or corporate investor, you must include material these individuals consider important. For example, if you want to acquire funding from a major corporation to build a facility, you will want to clearly express not only the relevance of your mission to the local community but to demonstrate how the corporation will benefit in turn.

One Plan Does Not Fit All.

Tailoring the business plan to the audience does not mean rewriting it each time; it means writing the initial plan in a modular style. Key sections (such as those outlining the organization's vision, values and mission) may remain intact for months or years. Others, such as the financial section, must be updated on an ongoing basis. Of course, specific sections written to address specific target audiences will not need to be included in the boilerplate version of the plan.

Many business plan formats exist; however, the following presents the most typical categories and what they should include:

Executive Summary:

Provide a succinct overview of the entire plan.

In the summary, you must grab the reader's attention, describe the organization's purpose, history, unique strengths and advantages, menu of products and services and market or need, as well as its operational plan and financial plan.

Body of the Plan and Organizational Structure:

Generally describe the organization and its corporate structure, including subsidiaries (if any), stage of organizational maturity, objectives, expansion plans and industry trends.

Products, Programs or Services:

Describe the products, programs and services your organization provides, as well as any special features of delivery, benefits and future development plans. Include information on any copyrighted, trademarked, service marked or patented items your organization has protected. Also include new products and services you plan to launch.



Marketing Plan:

Define the market and sub-sectors of the market (the constituency you serve), trends and importance of the market, need for your organization's services, competitive forces, distribution channels and promotional efforts, projected number of clients, costs and projected excess or earned income. In an appendix, include samples of promotional material.

Operational Plan:

Explain your organization's plans, location of your facility including satellite operations, capital equipment, inventory, program and service development and distribution approach, maintenance and evaluation of program services process.

Management and Organizational Team:

Describe your management team, principals, key management employees and their expertise. Also include board member and advisory board expertise and active financial sponsors. The for-profit sector often considers the management team one of the most important factors in deciding to invest in a company. Include an organizational chart and explain lines of authority and responsibility as well as an assessment of staffing needs.

Major Milestones:

Describe major program, service or organizational milestones, and detail how your organization plans to accomplish its goals. Include a time line and schedule of planned major events.

Capitalization:

Describe the organization's capital structure, outstanding loans, debts, holdings, bonds and endowments. Explain subsidiary relationships relative to the flow of capital to and from the organization.

Financial Plan:

Illustrate your organization's current and projected financial status. Include an income statement, balance sheet, cash flow statement, financial ratio analysis (if possible) and three-year financial projections, as well as an explanation of projections.

Considerations:

Articulate the organization's request or needs for financing, grant awards, major contributions, in-kind support and so on.

Appendix:

Depending on the organization, you might wish to include some or all of the following: résumés of key management, board member lists and pertinent charts, graphs and illustrations.

Your business plan is the road map of your organization's operational methodology, marketing and financing process and general management philosophy. The more accurate, detailed and compelling you make it, the more successful it will be.



IMPORTANCE OF A FEASIBILITY STUDY

The feasibility study is a process designed to research the practicality of engaging in a new venture, whether a new business venture or program or an expansion of existing services or markets. Whatever the project, the process follows a similar pattern. In essence, the feasibility study is the organization’s primary tool for assessing the practicality of a project and its capacity to operate the new or expanded venture.

A feasibility study should include a thorough review completed within a short time period, say 30-45 days. The organization needs to research the market to determine the extent of the need, potential pitfalls and controversies, as well as possibilities for expansion and completion.

By means of the study process, data is gathered to determine resource needs, potential benefits and probable liabilities. The feasibility study is not a sales pitch. It is not designed to promote a venture but research and assess the advantages and disadvantages of proceeding with one.

When properly executed, the feasibility study provides management and the board with a convincing analysis of the new venture’s potential risks and awards.

With the completed study in hand, the board, management and staff can decide whether to proceed. If they do, they should commission a more detailed plan to be completed and incorporated into the organization’s broader business plan.

The feasibility study provides management and the board with a convincing analysis of the new venture’s potential risks and rewards.

As with the business plan, a feasibility study can take a number of formats. The following is typical:

Type of Venture.

Describe the new venture, program or expansion idea: where it fits organizationally, who will benefit, how the organization benefits, how the venture fits into the organization’s mission and rationale for implementation.

Industry Information.

Provide information on the broader industry of which the proposed venture is a part, including trends, changes, anticipated milestones, controversies and special qualities your organization is prepared to bring to the table.

Resource Needs.

Describe in detail the amount of financial and other resources (such as staffing, equipment, facilities) required to properly implement the venture. Include any specialized equipment or employee skills you will require.

Target and Niche Markets.

Describe the intended target and niche markets, their current needs, how your organization will address those needs by reaching the target market and why the market might prefer your organization.

Assessment of Benefits

Describe how the new venture will provide value-added services to the organization and community at large. Analyze growth and near-term potential.

Assessment of Disadvantages.

Describe the obstacles, potential negative impact and problems associated with implementing the new venture. Discuss potential investment risks as well as potential political and legal complications. Additionally, consider potential risk to the organization’s tax-exempt status.

Financial Review.

Complete a pro-forma financial statement including a break-even point and return-on-investment evaluation.

Recommendation.

Based on the above, develop a recommendation to implement, postpone or not implement the new venture. Consider all possibilities, including developing strategic partnerships and recommending the new venture opportunity to another organization.

In summary, the strategic plan, business plan and feasibility study are each critical to developing financial self-sufficiency:

The strategic plan

articulates the organization's goal of financial self-sufficiency and interest in developing a sustainable flow of income unencumbered by funding source conditions.

The business plan

gives the organization the means to consider all relevant aspects of good management principles, details the organization's operation, and helps to assure successful implementation, growth and prosperity.

The feasibility study

enables the organization to consider new venture opportunities in relationship to its own capabilities and provides a reasonable assessment of risks and rewards.

SCORE – Counselors to America's Small Business believes that developing the art and skill of entrepreneurship is the engine for driving your non-profit organization toward financial capacity-building and self-sufficiency.

SCORE volunteers are ready and willing to assist your organization in implementing the entrepreneurial business practices to move your organization to the next step.

Additional resources can be found at www.score.org or at 800-634-0245.

Together, these processes form the foundation upon which the organization can identify its strategic opportunities, maximize its resources and move toward an environment of financial self-sufficiency.

Encouraging the Entrepreneurial Spirit



In this country, the individual dream of getting ahead, of building an economic base and realizing your potential, remains a powerful driving force. Entrepreneurs have fired the economy, inspired innovation and transformed the nation. Most would agree, the entrepreneurial spirit is something our society holds dear.

An entrepreneur is a catalyst of change, an innovative capitalist, a risk taker and inventor. Economist, Joseph Schumpeter defines an

entrepreneur as someone who changes the existing economic order by introducing new products and services, creating new forms of organization, introducing new markets and production methods, and exploiting new raw materials. Others put an economic spin on entrepreneurialism and describe it as the pursuit of an idea or approach without regard to resources. Still others look at the process of entrepreneurialism as an opportunity to create and an organization to pursue.

Establishing the entrepreneurial spirit also involves:

- Determining the areas within the non-profit organization that are weak and in need of improvement.
- Identifying the expertise needed to shore those weak areas and enlisting key players within the community, business and political arena who have that expertise and are willing to share it.
- Making sure the organization’s culture and operations encourage an entrepreneurial spirit.
- Seeking out management and staff with creativity, vision and drive. Include these skill sets in job descriptions and build incentives to reward entrepreneurship.
- Designing model programs or services that can be replicated and implemented in more than one marketplace.
- Treating employees, volunteers and clients alike as customers who have a choice of who they want to serve them.
- Creating transferable systems and efficiencies user-friendly to both internal and external customers.
- Instituting a process for continuous two-way communication between your organization and the community.



FINANCIAL OPTIONS

Up to this point, our discussion has centered on organizational planning, fiscal fitness and entrepreneurial development. Now it's time to look at the various financial options available to non-profit organizations.

Several options incorporate traditional funding sources from government, foundations, corporations and individuals, all with familiar methods of approach. Others include lesser known and possibly more complicated processes for acquiring funding such as bonds, endowments and joint ventures. Each of these different financial options requires a different investment of time, money and expertise. You must carefully analyze the cost of each option against its anticipated yield before making a decision.

When you conduct a feasibility study for a new venture, your organization should first determine the most appropriate organizational structure for the new venture. Several organizational options exist, including operating the venture within the non-profit's existing organizational structure as well as operating the new venture out of another non-profit subsidiary, a for-profit subsidiary or a general or limited partnership.

Each option has its own advantages and disadvantages.

ORGANIZATIONAL OPTIONS

Before every new venture, the non-profit organization should determine which organizational structure is most appropriate. Operating the new activity or venture within your organization's existing structure is often the most apparent option.

In any event, you must consider the advantages and disadvantages associated with each structure. For example, if you were thinking of establishing a subsidiary organization, you might want to ask yourself:

- How much control will my organization impose over the subsidiary?
- Will the majority of the subsidiary's board members also sit on the board of my existing nonprofit?
- Will the subsidiary's vision, mission and goals be similar to or different from those of the existing organization?
- How will the existing non-profit finance establishment of the subsidiary?
- How will the two organizations handle their year-end financial statements?
- What impact will the newly-established subsidiary have on the existing non-profit's image within the community it serves?

You might also ask yourself whether you should develop the subsidiary as a non-profit or for-profit organization. For-profit organizations enjoy access to capital not available to non-profits as well as the ability to write off losses and

generally greater overall freedom of operation.

Of course, profit is also a strong motivator for success.

On the down side, your for-profit organization will have tax liabilities. Profit motivations can also sometimes override community interests, and shareholder and investor interest can override employee needs and the creation of new jobs. As a rule, for-profit organizations cannot apply for foundation or government funds.

By contrast, a non-profit organization has access to grants, tax-exempt status (if income is related to the organization's mission) and eligibility for such benefits as postage discounts and volunteer help. Some non-profits are prohibited from engaging in political activity, however. The majority are also disqualified from most types of traditional financing and are closely scrutinized by funding sources. In the absence of profit as a motivator, non-profits tend to have a harder time quantifying their success.

Beyond the for-profit organization, the investment partnership may be another organizational structure worth considering. This type of partnership shares elements of the non-profit and elements of the investor: It allows the non-profit and investor to establish different categories of ownership and liability. Subcategories of investment partnership include general partners, limited partners and the sharing of income (a category often used in conjunction with housing development programs). For any of these options, legal assistance is highly recommended. Several organizations provide no or low-cost legal assistance.

ASSESSING FUNDING SOURCES

The time has come to assess where your organization stands with respect to funding.

Since income and expenditures are a part of your organization's financial statement, you should have no difficulty reporting income and expenditures on the IRS Form 990 so long as you meet the financial minimum. (Special rules apply to some religious organizations.)

For the most part, these financial reports are not designed to give your organization a clear picture of its reliance on any one type of funding – especially if you have developed diversified funding sources and set policy regarding your organization's level of dependency on any one source. Therefore, another assessment tool might prove helpful.

Begin by evaluating your organization's ability to increase funding options in any of the funding areas indicated in the following chart. The strategic planning process will help you to make this evaluation by highlighting your organization's strengths and weaknesses relative to the community and the competition.

Increasing your funding requires a more detailed evaluation of how well your organization ranks at any given time in any funding category. This quick assessment tool can also be used to determine your organization's performance relative to *Annual Giving and Planned Giving Categories*.

The following chart will help you to assess your organization's readiness to influence fundraising relative to funding options.

Funding Source	Funding Level (\$)	Percent of Grand Total (%)
Government		
• local		
• state		
• federal		
Sub Total	\$	%
Foundations		
• private		
• public		
Sub Total	\$	%
Corporations		
• grants		
• contracts		
• in-kind		
Sub Total	\$	%
Annual Giving (Individuals)		
• direct mail		
• telemarketing		
• membership		
• special events		
• donor clubs		
• capital campaigns		
Sub Total	\$	%
Planned Giving (Individuals)		
• endowments		
• bequests		
Sub Total	\$	%
Bonds		
• pooled issue		
• pooled pension		
• private offerings		
Sub Total	\$	%
Social Lenders		
• community loan		
• banks		
• insurance co.		
Sub Total	\$	%
Enterprise		
• fee-for-services		
• pilots		
• unrelated		
• joint ventures		
• investments		
Sub Total	\$	%
GRAND TOTAL	\$	

To complete the assessment, ask yourself these key questions regarding your organization’s planning process and its relationship to fund development:

- Is there a shared commitment by the board, management and staff to support fund development activities?
- Has your organization established clear and measurable fund development goals? Are these goals reasonable and cost effective?
- Is your non-profit young or a well-established, mature organization?
- Does your organization have name recognition?
- Are you known in the community, visible to your constituencies and respected as an organization that delivers?
- Is your organization building on its donor capacity?

An important fact underlies this last question: Donors who contributed during a previous year are more likely to contribute again the following year. Additionally, donors with a history of contributing to your organization – especially major donors – are more apt to consider an endowment arrangement with you.

Critical to targeting assistance and assessing needs is your ability to recognize the community’s impact on fund development. Contributions by board members are one way to gauge the community’s level of commitment. The board’s degree of involvement will also be reflected in the expertise it shares and in its ability to influence others in the community to provide in-kind and financial assistance.

- You might also ask:
- Has your organization developed volunteer groups or auxiliaries to build community exposure?
 - Can other strategic partnerships assist in leveraging resources to maximize efforts while minimizing costs?
 - Does your organization have the staffing to manage fund development activities?

With this assessment, you can begin to address your organization’s ability to leverage its capabilities and develop its opportunities for growth. Benchmarking your organization against itself, or against similar organizations, is yet one more step towards achieving financial self-sufficiency.

A Few Basic Tools

In this last section we offer a few basic analytical tools to help with the planning and feasibility study process.

First is the *cash flow projection*. It is used to forecast an organization’s cash position at specific points in the future. The formula is straightforward. Identify the period for the forecast, i.e. month, quarter or year. Record the actual cash on hand at the beginning of the period. Add to that amount the forecast of cash to be received during that period. Subtract from that total the forecast of cash to be paid out during that period. The result is the forecast of cash on hand at the end of the period.

This process is valuable because for most young organizations their potential revenue is so volatile and unpredictable. In addition, in the early stages of development there is a tendency to be overly optimistic about revenue. Consider the example below.

One additional element has been added to this projection; the last column expresses the organization’s confidence that the revenue will be realized. In this example, the organization needs to increase its fundraising to make this projection realistic.

Cash Flow Projection						
Revenue	Cash 1/1/05	1 Qtr	2 Qtr	3 Qtr	4 Qtr	Confidence
Special Event 1		\$ 25,000				80%
Individual Donations		\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	85%
Corporate Donations		\$ 12,500	\$ 12,500	\$ 12,500	\$ 12,500	60%
Foundation Grant				\$ 5,000	\$ 25,000	40%
Total		\$ 50,000	\$ 25,000	\$30,000	\$50,000	
Expenses						
Labor		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000	
Other		\$ 25,000	\$ 12,500	\$ 40,000	\$ 5,000	
Total		\$ 50,000	\$ 37,500	\$ 65,000	\$ 30,000	
Net			(\$ 12,500)	(\$ 35,000)	\$ 20,000	
Cash on hand	\$ 50,000	\$ 50,000	\$ 37,500	\$ 2,500	\$ 22,500	

The value of developing cash flow projections comes from conducting the analysis required to make the forecast, identifying expected costs and revenues, and the planning resulting from the forecast. In this example, the third quarter looks problematic. What could be done? The organization could attempt to secure additional revenue for the quarter, move the grant from the fourth quarter to the third, obtain a line of credit and or cut expenses in anticipation of the problem.

The second tool is the *gap analysis*. The gap analysis is a matrix often used to identify the gap between the skills or assets it possesses.

Gap Analysis				
Skill and Attributes	Fundraising	Financial Management	Adds Diversity	Individual Wealth
Tom	X			X
Jane		X		
Carlos		X	X	
Ana			X	X

The third tool is a *cost-benefit study*. In one sense, a feasibility study is a form of this tool. What is proposed here is a very simple version. On one piece of paper, list all of the quantifiable benefits of a proposed initiative. Next list the qualitative benefits. On another piece of paper list all of the quantifiable costs followed by the qualitative costs. First compare the quantifiable costs and benefits. Next compare the qualitative factors. Finally compare the complete lists to evaluate overall value. Below are some examples:

Costs

- Salaries, benefits, training, recruiting, etc.
- Rent, travel, utilities, insurance, expenses, etc.
- Marketing, advertising, printing, etc.
- Management, supervision, administrative support, etc.
- Organization focus, mission drift, conflicting messages, etc.

Benefits

- Revenue, clients, customers, donors, contracts
- Brand awareness, name recognition
- Opinion leader support, friends, networks

One of the values of this tool is focusing the organization on identifying intangible benefits and costs and trying to calibrate them in some way.

The fourth tool is a list of *strategic questions* prepared before developing a specific strategy. Here is a list to consider:

- What is the real issue?
- How does this strategy fit with our mission and vision?
- Will our message enhance or detract from our brand?
- What will our stakeholders think?
- Is there an opportunity in this?
- What is the greatest obstacle to our strategy’s success?
- Is there someone we can partner with to increase our chances of success?
- What is the cost-benefit ratio of our plan?
- What will be the impact on the rest of our organization?
- What’s the worst that can happen?

The value of this process is in the preparation of the questions in advance and answering them honestly before adopting the strategy.

CONCLUSION

Much has been written on how the for-profit sector can maximize its profits and develop long-term financial plans for growth and prosperity. Unfortunately, the literature for non-profit organizations is scant by comparison – an absence caused by and reflective of the classic problems non-profits face:

1. The ability to make profit and generate unrelated business income.

Since the 1950s, when non-profit tax-exempt organizations were required to declare and pay corporate taxes on unrelated business income, numerous court battles and pieces of legislation have challenged non-profit motives. Since tax law is vague on the issue of unrelated business income, non-profit organizations are constantly at risk of losing their tax-exempt status and having to pay unexpected taxes on income (declared by the IRS or courts to be considered unrelated business income). This dilemma also presents political problems for non-profit organizations fearing negative publicity from challenges or claims of impropriety from the for-profit sector.

2. The absence of a “bottom line” as a key performance indicator.

Well-managed non-profit organizations are numerous; however, the people who manage them tend to be zealous leaders within their fields whose experience is based on the organization’s mission rather than on management.

As a result, non-profit organizations often lack a fundamental knowledge of management, planning, accounting and finance. Without proper leadership and management, the organization flounders, faces constant financial struggle, and risks becoming a community liability rather than an agent for social change.

3. The importance of a shared value system in sync with society’s needs.

In the for-profit sector, products and services are sold in an environment that tells companies in clear-cut terms how competitive they are. Customer survey tools, marketing techniques and other media mechanisms provide feedback and indicate when change is needed. Nonprofit organizations operate in an adversarial world, constantly touting the importance of their mission, hoping to create change. Too often focused exclusively on preaching to the community, they sometimes lack the ability to see or hear signs of the community’s changing needs.

4. The need to seek funding coupled with survival instincts.

As discussed elsewhere, the old adage, “He who has the gold makes the rules,” applies to all sectors in our economy including the non-profit sector. Conditions, restrictions and guidelines attached to funding are a commonly accepted reality in the non-profit area.

Business Planning Tools for Non-Profit Organizations

Section 2

Volunteerism – A Valuable Strategic Asset

5. *Reliance on fee-for-service programs.*

This dilemma more than any other has the greatest potential for unraveling the non-profit organization. As non-profits feel the pinch of government downsizing and shrinking contributions, many will inevitably attempt to grow “fee-for-service” type programs. In this, non-profit organizations become most vulnerable to criticism – the classic “competitive squeeze” described earlier.

To summarize in briefest terms the discussion in this guide, these are the steps available to you to combat these problems and develop financial self-sufficiency:

- *Manage your organization well.*
- *Maintain a diversified funding plan.*
- *Build additional corporate structures and perpetual funding opportunities.*
- *Operate with an entrepreneurial philosophy.*

By implementing these measures, you strengthen your prospects of long-term survival. With that, you can more readily focus once again on changing society and serving the public good.

**SCORE volunteers can
assist your organization.**

**SCORE resources can be found at
www.score.org or at 800-634-0245.**

VOLUNTEERISM OVERVIEW

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According to a July 2009 national survey of non-profits and AmeriCorps sponsor organizations:

“80 percent of responding organizations experienced some level of fiscal stress between September 2008 through March 2009, when the downturn intensified, and for close to 40 percent of them the stress was considered “severe” or “very severe.” In response, nearly a quarter (23%) of non-profits reported decreasing staff hours, a third reported eliminating staff positions, and 40 percent reported postponing the filling of new positions. At the same time, nearly three-fourths of the organizations reported they had maintained or increased the number of people their organizations served, and even among those reporting “severe” or “very severe” fiscal stress and resulting cutbacks in staff, 60 percent reported they had been able to maintain or increase the number of people their organizations served.”¹

The Corporation for National and Community Service, which partnered with the Johns Hopkins Nonprofit Listening Post Project to conduct the research, determined that the reason that this was possible was due in large part to the highly valued commodity that all-non-profits need to safeguard – volunteerism.

As the report points out:

At least part of the explanation lies in the increased use organizations were able to make of volunteers. In particular:

- One out of every three organizations reported increasing their reliance on volunteers to cope with the economic downturn between September 2008 and March 2009.
- Whether because of the recession, or despite it, most (80% to 90%) responding organizations reported maintaining or increasing their use of volunteers, whether this was measured by the sheer number of volunteers (88% of organizations reported maintaining or increasing the scale), the number of volunteer hours (84% of organizations reported maintaining or increasing this number), the ability to recruit volunteers (83% of organizations reported increasing or maintaining this capacity), or the contributions that volunteers made (83% of organizations reported increases).
- This reliance on volunteers is expected to increase further over the coming year. About half (48%) of the organizations expect their reliance on volunteers to increase over the next year, and only five percent expect it to decrease. This is so, moreover, despite the fact, or perhaps because of the fact, that 33 percent of respondents say they expect to cut staff in the coming year.
- This increased reliance on volunteers seems to have yielded important dividends for organizations. Thus:
 - The 33 percent of all organizations that reported relying more heavily on volunteers as a coping

strategy during the September 2008-March 2009 period were more likely than their counterparts in the overall sample to report “very severe” fiscal stress (40% vs. 26%);

- Yet these organizations were still nearly as likely as the overall sample of organizations to report that they were “somewhat” or “very” successful in coping with the economic crisis (58% vs. 66%);
- Similarly, these organizations were nearly as likely to report generally positive views of their futures (69% vs. 75%).²

What does this mean for non-profit organizations looking to stabilize their bottom line and mission while maintaining or enhancing their ability to deliver services, resources and programs in their local

communities? Is simply gathering more volunteers the final answer and solution to the problem? Is there a need to be more systematic and systemic in developing a volunteer program that can withstand the changes in economies, community demographics, and the sources for volunteers that are relied upon?

Some of the answers may be found in the research brief “Volunteers and the Economic Downturn” by the Johns Hopkins Center for Civil Society Studies, which points out the following:

While increased reliance on volunteers has proved to be a useful strategy for coping with the economic crisis, it is hardly a panacea, particularly in the face of decreasing paid staff. As one respondent put it: “If there is not someone managing these volunteers,

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it will be difficult to engage and rely on volunteer support.”

Data from the Hopkins Listening Post survey already reveal an emerging challenge in this area. Thus:

- While 37 and 39 percent of organizations reported increases in the number of volunteers, and the number of volunteer hours, respectively, only 15 percent reported an increase in their ability to manage volunteers. On the other hand, over 10 percent reported a decline in this ability.
- Organizations that reported staffing issues, namely an inability to attract and retain staff, were also

more likely than the sample as a whole to report declines in their ability to manage volunteers (27% vs. 11%, respectively);

- Organizations that both increased reliance on volunteers and increased their ability to attract and retain staff were more likely to report being “somewhat” or “very” successful financially as of March 2009 compared to those that increased reliance on volunteers but that suffered declines in their ability to attract and retain staff (67% vs. 33%).³



Volunteerism in Your Non-Profit Business Planning Model

If you take the perspective that volunteers are a valuable strategic asset and revenue source, your overall non-profit business planning process is immensely enhanced. Inclusion of your volunteerism model in the process allows you to balance the staffing needs of your organization against the backdrop of the level of service/resource delivery and the need for paid and unpaid staff.

As the research brief “Volunteers and the Economic Downturn” points out:

“It is clear that organizations are reaching out to volunteers for support. Organizations that were hardest hit by the economic crisis seem to have been most likely to increase their reliance on volunteers. Thanks at least in part to the availability of volunteers, many of these organizations were able to maintain or increase their client or patron services.

While volunteers are playing and will continue to play an instrumental role in helping the non-profit sector survive the economic crisis without reducing its services, over the long run it will be important to avoid thinking of volunteers as a substitute for paid staff. To the contrary, in normal times it is precisely the presence of paid staff that makes volunteer assignments most effective.”⁴

Effective business planning in non-profits requires

that the leadership and management paint a full picture of the organization’s assets and liabilities. Proper business planning will allow the organization to develop strategies and systems that will not create imbalances in its operations so as to falter in the delivery of services and programs. For example, if properly planning for the delivery of a new program that requires consistent delivery and depends heavily on volunteers, the organization would not be well-served to not consider a paid volunteer manager of that new program in hopes that volunteers alone would guarantee effective and consistent delivery year after year. Conversely, a program that is heavily staffed with paid personnel might be better served if the organization considered adding some volunteers to the program’s staffing model to create greater efficiencies.

In both cases, the various options and strategies to be employed would not be possible if the organization did not engage in a business planning process, which allowed for all the revenue and staffing sources to be included in the deliberations and decision-making process. A comprehensive approach which allows a charitable organization the freedom to explore alternative staffing, funding and program delivery models will make the difference between those that survive and those that do not over longer periods of time.

^{1,2,3,4} “Volunteers and the Economic Downturn – Research Brief.” Salaman, Lester M. and Spence, Kasey I. Johns Hopkins Center for Civil Society Studies and the Corporation for National Service. July 2009.

Exercise 1 – Prioritizing Goals for Your Volunteer Program

— by Ivan Scheier, The Center for Creative Community

Listed below are some of the purposes or goals a volunteer program might have. Though they overlap somewhat, these purposes are distinct from one another, and it is unlikely that any volunteer program would have the resources to effectively implement every one of these goals. The choice is important because the goals you concentrate on will determine how you operate your volunteer program – selection of volunteers, training, etc. This exercise is designed to help you identify, clarify, affirm or re-affirm the priority goals for your volunteer program.

The following exercises will assist you in incorporating your current or planned volunteer program into your overall non-profit business planning process.

Step 1.

Please review and familiarize yourself with the following list of possible primary purposes/goals for a volunteer program.

- Enhance the intensity and quality of services currently provided to clients, patients, etc.
- Support paid staff so they can be more fulfilled and effective in their work.
- Improve the agency/organization's image and public relations in the community.
- Provide a cushion against the damage done to the organization by budget cuts.
- Educate the public about what we do and why we do it.
- Help provide a variety of important services and capabilities we otherwise could not offer (in that sense, help us achieve our dream).
- Provide a valuable “proving ground” to identify and pre-train potential new paid staff members.
- Cultivate active friends and advocates – a support base in the community for the agency and for the people it serves.
- Help us raise money or equivalent in-kind resources in support of our work.
- Contribute ideas and input from the community – act as a sounding board to gauge community reaction to programs, projects, etc.
- Comply with a mandate either from a funding source, government, or wherever...

Step 2.

Are there other distinct goals you think the volunteer program does serve or might serve?

If so, please list them below.

Step 3.

Among the goals/purposes listed in both Steps 1 and 2, which do you think are or should be the top three priorities of your volunteer program? Indicate these by placing a 1 (top), 2 (next), and 3 (third highest priority) next to these goals. (If this is felt to be too restrictive, you can do the same thing with the top five goals.) Comparing independently rated goal priorities by stakeholders in the volunteer program (certainly including volunteers themselves) can lead to productive discussion of differences, and eventual working consensus.

Exercise 2 – Implementing a Volunteer Management System

Once you have determined your priority goals for your volunteer program, in your business planning process you will need to review and act upon the following suggested checklist to determine if your management systems, processes and model are comprehensive and balanced.

Checklist for Volunteer Management

Rating*	Indicator	Met	Needs Work	N/A
Indicator ratings: E=essential; R=recommended; A=additional to strengthen organizational activities				
E	The organization has a clearly defined purpose of the role that volunteers have within the organization.			
E	Job descriptions exist for all volunteer positions in the organization.			
R	The organization has a well-defined and communicated volunteer management plan that includes a recruitment policy, description of all volunteer jobs, an application and interview process, possible stipend and reimbursement policies, statement of which staff has supervisory responsibilities over what volunteers, and any other volunteer personnel policy information.			
E	The organization follows a recruitment policy that does not discriminate, but respects, encourages and represents the diversity of the community.			
E	The organization provides appropriate training and orientation to the agency to assist the volunteers in the performance of their volunteer activities. Volunteers are offered training with staff in such areas as cultural sensitivity.			
R	The organization is respectful of the volunteer’s abilities and time commitment and has various job duties to meet these needs. Jobs should not be given to volunteers simply because the jobs are considered inferior for paid staff.			
R	The organization does volunteer performance appraisals periodically and communicates to the volunteers how well they are doing, or where additional attention is needed. At the same time, volunteers are requested to review and evaluate their involvement in the organization and the people they work with and suggest areas for improvement.			
R	The organization does some type of volunteer recognition or commendation periodically and staff continuously demonstrates their appreciation towards the volunteers and their efforts.			
A	The organization has a process for reviewing and responding to ideas, suggestions, comments and perceptions from volunteers.			
A	The organization provides opportunities for program participants to volunteer.			
A	The organization maintains contemporaneous records documenting volunteer time in program allocations. Financial records can be maintained for the volunteer time spent on programs and recorded as in-kind contributions.			

Source: United Way of Minneapolis Area

Start a Conversation about Volunteerism in YOUR Organization!

Many staff at organizations and agencies still base their beliefs about volunteers on the stereotypes of the 1950s, ’60s and ’70s. Those images are remarkably resilient, and in organizations that have retained long-term volunteers, they may still be somewhat accurate. Repeated and reinforced messages to staff are needed to supplant old ideas with more accurate portrayals of what volunteers are and can be in the new millennium.

In order to better assess and plan for strategically including or growing the use of volunteers as an asset in your organization, it would be beneficial to consider the following questions: *(Write your answers down on paper so that you can reflect on them in the balance of your planning process.)*

1. In as few words as possible, describe your volunteer program’s role in your agency or organization’s mission.
2. How does our volunteer program compare to a model program and to programs at other organizations?
3. How could our organization involve more volunteers? What programs, projects, jobs, or tasks could we involve them in, either on a long-term or short-term basis?
4. What could we NOT do – or NOT do as well – without the help of volunteers?
5. When do these tasks really need to take place?
6. Where do these tasks really need to take place?

7. What skills, personality traits, and other qualifications do volunteers need to do the tasks?
8. What is our organization’s capacity to support a volunteer program?
9. What is the paid staff’s perspective on working with volunteers?
10. What are the capacities and needs of our volunteers?
11. Who are our volunteers? How many volunteers do we have? Where do they come from? What do they do – policy, program, managerial, fundraising, support?
12. What do our volunteers think about volunteering here?
13. What are the issues to be resolved in our community? What needs or problems could we involve the local residents, as volunteers, in solving?
14. What does our community look like? Who lives in our community? What is it like economically and socially?
15. What are our community’s strengths and capacities? What kinds of skills, talents, and assets do the local residents have? What kinds of organizations are based here: private, public, not-for-profit?

Adapted and expanded upon utilizing “Ten Things to Research, Evaluate or at Least Think About,” by Celeste J. Wroblewski, from The Seven Rs of Volunteer Management, pp. 31-32.

SUMMARY

“A person starts to live when he can live outside of himself.” – Albert Einstein

As stated in the first section of this workbook, the role of this so-called “third sector” of the economy has become a vital part of our national culture. Philanthropy and volunteerism go hand-in-hand as effective instruments for addressing social needs outside of government. To ensure that your organization remains effective and achieves its mission in your community once again means taking the time to develop the strategies and skills to build the capacity of your organization. Integral to this process is recognizing and including the valuable asset of your volunteer program into your business model.

To secure ongoing resources free from constraints imposed from the outside, non-profits must continually pursue a long-term planning process and use business tools to assist them in making sound decisions.

WHY VOLUNTEER

Excerpts from the Corporation for National and Community Service website sections on individual volunteering

The Value of Volunteering – Top Reasons to Volunteer

There are as many reasons to serve as there are people who serve. Volunteering is not just an altruistic act. It’s an opportunity to advance in all areas of your life. Here are a few of the things you can gain when you give your time and yourself:

- Connect with your community.
- Conserve funds for charities, non-profits and faith-based and other community organizations by contributing your time.
- Share your skills and gain new ones.
- Develop self-esteem and self-confidence.
- Meet new people from all walks of life.
- Enhance your resume and make important networking contacts.
- Promote a worthwhile activity.
- Feel needed and valued.
- Experience something new.
- Serve your country.

What’s on your list of top reasons to volunteer?

Benefits of Service

Some Benefits You Feel, Other Benefits are Real

Perhaps the first and biggest benefit people get from volunteering is the satisfaction of incorporating service into their lives and making a difference in their community and country. The intangible benefits alone – such as pride, satisfaction and accomplishment – are worthwhile reasons to serve.

But there are other benefits as well – tangible benefits such as awards, job and education certifications, and more.

I’m Ready to Serve

There are many ways to serve, and many reasons. Each one is an opportunity to express your patriotism, deepen your ties to the community, and do lasting good. No matter what your age or background, your education or interests, your experience or abilities – there are opportunities for you.

“I don’t know what your destiny will be, but one thing I know. The only ones among you who will be truly happy will be those who have sought and found how to serve.” – Albert Schweitzer

CARING CONNECTION

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Later in this workbook, beginning on page 53, you will find valuable information about recruitment of volunteers. The Office Depot Foundation – the independent foundation that serves as the charitable giving arm of Office Depot, Inc. – is pleased to offer a free resource to assist non-profit organizations with this process: the Caring Connection.

The Office Depot Foundation has recognized the importance of volunteerism throughout its history. Office Depot associates have always been encouraged to volunteer – and they have accomplished great things. Building on this tradition of caring, and in support of its strategic priority of “strengthening local communities,” the Foundation launched the Caring Connection – a user-friendly website that lets anyone find and sign up for volunteer opportunities in their community. The Caring Connection site is accessible from the home page of the Office Depot Foundation website at www.officedepotfoundation.org or directly at <http://caringconnection.volunteermatch.org>.

Presented in collaboration with VolunteerMatch, the Caring Connection provides access to information about 60,000 volunteer positions offered by more than 70,000 non-profit organizations across the United States. Since its launch, the site has helped teens find ways to fulfill their schools’ community service requirements. Families have learned about opportunities to volunteer together, and companies have found projects that their employees could

work on for team-building and to give back to the community.

The benefits of the Caring Connection are not restricted to the volunteers themselves, however. Non-profit organizations that use volunteers to help them carry out their programs can register for free to list their opportunities directly on the Caring Connection website.

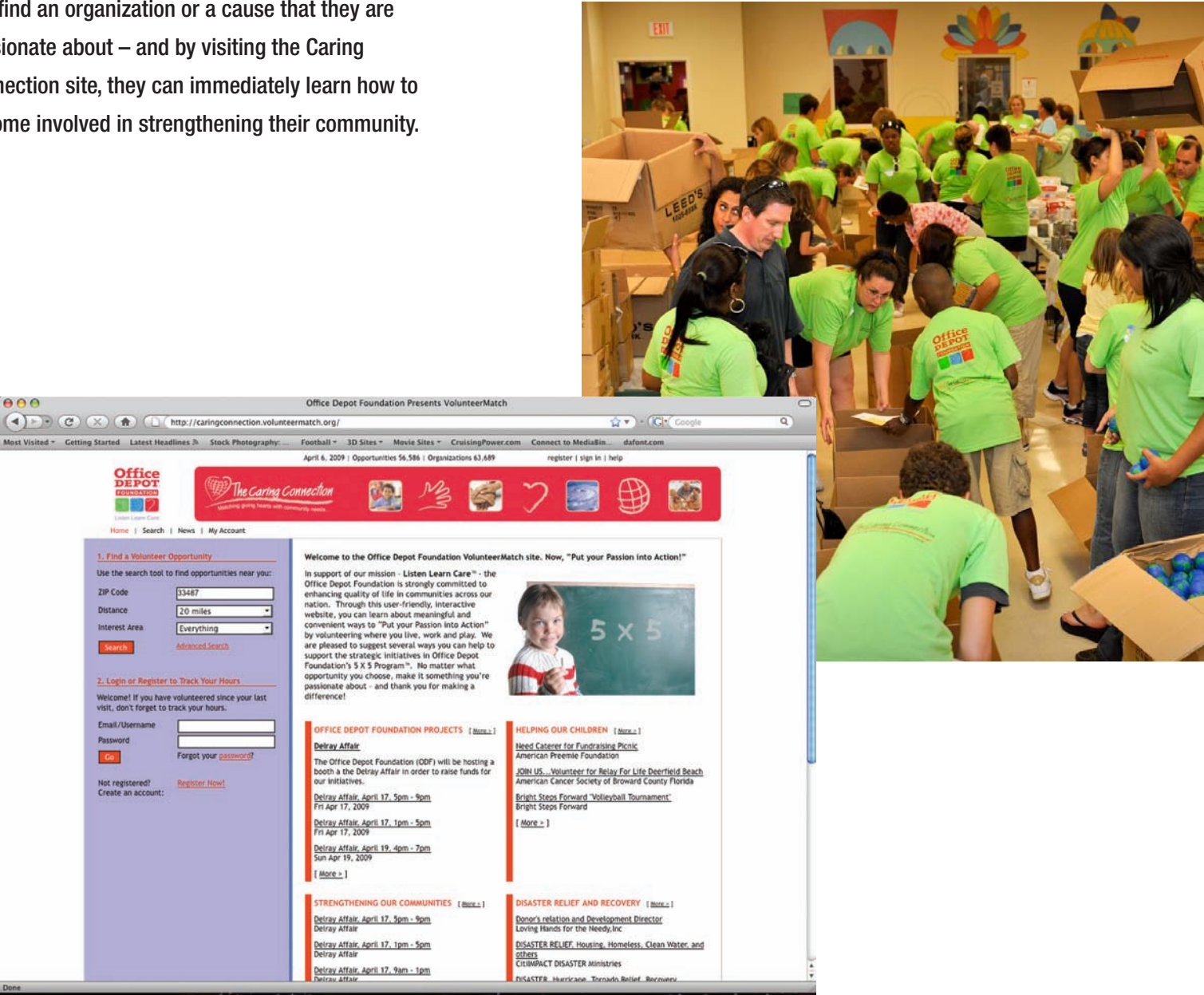
People who are interested in volunteering have the ability to search for opportunities in a number of ways and, potentially, to find your organization.

When someone sees an opportunity that looks interesting, they can learn specific details about the ongoing program or special event that the organization is sponsoring. They can also learn more about your organization, see how to contact you and link directly to your website.

When a person wants to volunteer, he or she will be asked to register for the Caring Connection, or to log in to an existing account. Then, potential volunteers can send you a message to inform you of their interest. At that point, it's up to you to contact them and proceed with your standard volunteer sign-up process. Registration ensures that the volunteer’s contact information is accurate so that you are able to get in touch with them regarding their interest in volunteering.

The tagline that the Office Depot Foundation uses for the Caring Connection is “Put Your Passion into Action!” The Foundation believes that everyone can find an organization or a cause that they are passionate about – and by visiting the Caring Connection site, they can immediately learn how to become involved in strengthening their community.

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Planning for the Volunteer Program: Vision/Mission/Policies and Procedures

“Our nation will succeed or fail to the degree that all of us – citizens and businesses alike – are active participants in building strong, sustainable and enriching communities.” – Arnold Hiatt, President, The Stride Rite Foundation

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Too often, a volunteer program begins with the plan of finding volunteers to get a job done, followed by recruitment of volunteers. Actually, position development and recruitment are the third and fourth steps in the process. To start with recruitment may net initial rewards, but ultimately will stymie the agency’s goals and the hope of a long-term, well-integrated volunteer program that can fill many needs within the organization.

Instead, begin by planning and organizing, developing a climate of agency receptivity and creating a vision and mission for the program. Finally, develop policies and procedures to reduce risk, ensure smooth systems and clear organization. When that’s complete, recruitment can begin.

For a volunteer program to be successful, it must be a partnership between the paid and unpaid staff. Paid staff must see the volunteers as helping them meet their goals and must feel rewarded for supervising and involving volunteers. Involve staff in creating, then articulating, the purpose of the volunteer program, its vision and mission.

Ask staff why volunteers are needed or wanted. What value would be added by developing a volunteer program? What benefits – to the clients/public, agency, or community – would result from a successful volunteer program? How could volunteers expand services and help staff? What could the agency as a

whole accomplish if it had a volunteer corps?

The reasons for developing a volunteer program may be many and multi-faceted. Some typical answers include: expanding resources by gaining practical assistance with specific, needed jobs; utilizing skills that staff don’t and won’t have; enhancing public relations by developing community emissaries; creating support for clients that is non-threatening; building external support for the cause and invigorating paid staff.

Once volunteer program managers, other staff and their bosses understand why they want volunteers, they are ready to begin creating a vision and mission for the volunteer program. Just as the agency has a vision and mission, so should the volunteer program. The statements should mirror the organization’s, show how the volunteer program supports the agency’s vision and mission and use the same format. The process should include staff, directors and board members.

Creating vision and mission is not fluff. How else will staff, board and volunteers understand the purpose of volunteerism at the agency and the value added by a volunteer program? What else could be better utilized to motivate and inspire staff and volunteers?

There are many differing opinions, and no right answer, as to what vision and mission statements are and how they should read. Most agree that the vision

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should encompass the future ideal. Some believe it should be a detailed picture. Others say it is a short, meaningful, easily remembered statement. In either case, it should tell of the better world created after the agency and volunteer program accomplish their goals.

There is similar disagreement on the format and purpose of the mission. Some say a mission should state the ultimate goal of the agency or volunteer program; for example, to wipe out illiteracy or hunger. Others say that is the role of the vision while the mission statement describes the business of the agency or volunteer program and how it will achieve the vision. Volunteer program managers should look at their organization’s vision and mission and create similarly styled statements for their programs.

After the vision and mission are developed, the structure of the program must be decided. There are three basic structures for a volunteer program: centralized, decentralized and combination. The centralized program often occurs in smaller agencies where staff support is highly limited. In this design,

volunteer coordinators, directors or program managers directly train and supervise the volunteers as well as screen them and provide recognition and retention strategies. This structure is appealing to many program managers who want direct contact with and control over volunteers.

The centralized model can, however, be limiting. One person can effectively supervise only a limited number of volunteers during a limited number of hours. So the centralized system works better for event-oriented volunteer programs, small programs in which the services occur only during certain hours or programs that don’t need on-site, ongoing supervision.

A decentralized program requires agency staff to train and supervise volunteers. The volunteer program manager still screens and orients, handles issues, conflict resolution and new program development, but acts more as a human resource generalist, leaving the “experts” – program staff working in a particular area – to supervise.

This system allows for endless expansion of the volunteer program if there are staff willing to train and supervise. It should provide better training for volunteers, which reduces risk. For the volunteer program manager, the challenge then becomes working with staff, helping them become effective supervisors by educating them on volunteer issues and motivation. Volunteer program managers also lose control in this structure as they are reliant on good supervision to maintain a quality volunteer program.

Once the structure is created, it's time to create policies and procedures. Policies can reduce risk, ensure smooth systems and clear organization. They steer the program, reflect the agency's values and are the guiding principles and parameters that influence action. While too many policies are ineffective, making the program feel over-regulated, too few will make the program vulnerable with important issues left unaddressed.

Policies are fluid documents that should be reviewed annually and revised when necessary. The volunteer program's policies should be specific and mirror the organization-wide and human resources policies. For example, if the agency has a confidentiality policy, the volunteer program should too and it should mimic the organization's as a whole. Some typical areas for policy development include, but are not limited to:

- Liability issues and insurance
- Confidentiality
- Probation period
- Reasons for termination or discipline
- Grievance procedures
- Equal employment/non-discrimination
- Benefits
- Timesheets/sign-in
- Notification of absence
- Dress code
- Criminal background check
- Screening process
- Training and orientation requirements
- Evaluation/Assessment
- Visitors
- Use of equipment

“No one is useless in this world who lightens the burden of it for someone else.”
– Benjamin Franklin

Creating Volunteer Jobs and Position Descriptions

As our society moves at an ever-faster pace, and free time becomes more and more limited, volunteers' need for meaningful, challenging work increases as well. Like the rest of us, volunteers have little available time and too many demands.

In order to recruit and retain valuable volunteer resources, the jobs that volunteer program managers design must be interesting, rewarding positions that utilize skills and interests. These jobs and the work volunteers do in them are the product of the volunteer program. To be meaningful, these assignments must meet the needs of the organization, but contain the added element of meeting the needs of the volunteer spending his or her free time working without financial recompense.

Developing jobs people want to do is one of the most important aspects of volunteer program management. Let's face it. Volunteers are not being paid. Their motivation is fundamentally different than paid staff's. They have many options for their free time. The only reason they will continue to volunteer is if they are doing something they want to do and that they feel is needed.

The job of the volunteer program manager is to educate staff as to what kinds of volunteer positions

they can realistically fill. For example, staff's greatest need might be daily filing of reports, but it can be a tough sell to volunteers, most of whom want challenging work, if they feel they can make a more meaningful contribution. If the volunteer program manager understands staff needs and can work with staff to help them better understand the needs of the volunteer, the organization reaps huge benefits.

Whether your program is centralized or decentralized, the first step in creating productive, important volunteer positions is finding out what staff perceives are its volunteer needs. No volunteer job is meaningful if it is not needed. While these meetings will probably be a process of relationship- and trust-building as well discerning each other's needs, they could have the added benefit of minimizing those dreaded requests for a full-time volunteer receptionist or file clerk from staff who just don't understand the volunteer dynamic.

Meetings with staff will enhance knowledge of the different departments and will, ultimately, help with matching and placement during the screening process. It's also a chance to market the volunteer program internally to staff who may not know the breadth of possibilities volunteer assistance may offer.

Sometimes, the job development process occurs in reverse. Volunteer candidates approach a program with specific interests, talents or experiences they

want to use, but no existing volunteer job fits. With a network of staff contacts and a good working knowledge of the organization, a volunteer program manager can determine – through talking with staff – if there are unmet needs the candidate can fill.

In either scenario, a written job description or training checklist is a must in a well-run volunteer program. It will lay out the parameters of the work to be done and the expectations of the program and supervisor. It can serve as a marketing and screening tool, and because it spells out exactly what a volunteer should do in an assignment, it is a basis for supervision and evaluation.

Don't develop these tools in isolation. In a decentralized program, job descriptions must be developed primarily by the paid staff who train and supervise volunteers. They know the specifics of what they want done. The volunteer program manager should assist, ensuring the tasks and training are reasonable and cover all liability. In a centralized system, discussion with staff who will work with or near the volunteer and their feedback will be helpful.

Volunteer job descriptions should include these essential elements:

- Job title
- Supervisor's title, department and description of department

- Purpose of the assignment and its connection to organization's mission
- Description of position
- Responsibilities/duties of volunteer
- Qualifications (if any are required or desired)
- Training and other requirements, such as criminal background checks, confidentiality or health assessments
- Timeframe or commitment
- Benefits

Some programs use a training checklist instead of a job description, which combines the position description with a checklist of all items in which the volunteer should be trained. When completed both the volunteer and the trainer sign the document and it is kept in the volunteer's personnel file. This allows the volunteer a clear conception of what the assignment entails and documents training. The volunteer can also sign and date a copy of the job description, stating they have understood its contents, and that can be placed in the volunteer's file.

"I shall pass through this world but once. Any good, therefore, that I can do or any kindness that I can show to any human being, let me do it now. Let me not defer or neglect it, for I shall not pass this way again." – Mahatma Gandhi

Recruitment

While the concept of recruitment is intimidating to many, it is simply finding people who want to do the volunteer jobs the agency needs done. It is not convincing people to volunteer in jobs that don't interest them. As with so many other aspects of volunteer management, matching jobs with people is the key element. Good recruitment means piquing the interest of potential volunteers by the possibility of a volunteer job that matches their interests and experiences.

Position design and descriptions, then, are a required prequel to recruitment. Knowing why volunteers are needed, how many and what type of person would be a good match, and, of course, ensuring the positions are interesting and meaningful, is essential. Otherwise, recruitment is ultimately doomed to failure.

Part of the strategic planning process for recruitment is knowing the agency and its perception in the community, learning what barriers there might be to volunteering with your agency and, conversely, why people might want to volunteer with your agency. For example, there might be much interest in the community for a program that tutors youth, but if the tutoring site is not near public transportation or in a dangerous neighborhood it will be more difficult to recruit volunteers. If the organization can eliminate these barriers by busing volunteers to the site,

developing off-site work in a safer neighborhood or making other arrangements to ensure safety, recruitment would be easier.

Another area that can trip up volunteer program managers is over-recruitment. Finding too few volunteers to meet needs is undesirable, but too many can cause difficulties as well. While a waiting list can hold some community cachet, it can also affect your public image. Volunteers may wonder why you are asking for help when you don't have enough openings to accommodate them, and this can cause resentment. Targeted recruitment (described below) is the best strategy for a volunteer assignment with limited openings.



As in the rest of life, honesty is the best policy. In your recruitment materials and presentations, tell people exactly how many people you need, what the requirements, criteria and screening process are. Tell people what they will and will NOT be able to do as volunteers. If people come away from a recruitment presentation thinking they will be able to “counsel troubled youth,” but in reality only licensed social workers do counseling, volunteers will be disappointed and angry with the false advertising. Those are volunteers who won’t stick around.

Taking the time to design a recruitment campaign, then, is essential. Brainstorming the barriers and possibilities with staff, current volunteers and program staff, creating fulfilling jobs that are important to the organization, knowing staff’s needs and understanding that you are not trying to convince someone to volunteer at your agency. You are giving people a gift: the chance to do something they really want to do.

There are two basic recruitment strategies: the targeted and non-targeted methods. Non-targeted recruitment is a mass appeal for any type of person who is available, and is generally most effective for jobs that require little skill, such as special events, house painting or park clean-up. Most volunteer programs need a more sophisticated approach that involves recruiting people who have a specific interest in the work of the agency and have the skills to perform a specific job needed by the agency. This is called targeted recruitment.

Non-Targeted Recruitment

To design an effective non-targeted recruitment campaign, consider utilizing these recruitment methods:

- Most importantly, ask people to volunteer. Surveys show most people don’t volunteer because no one asked them.
- Create your message.
- Place a newspaper ad.
- Do a public service announcement.
- Get media coverage of your volunteers or volunteer program.
- Post flyers with a general message to distribute at supermarkets, senior centers or schools.
- Put requests in church bulletins, company or organizational newsletters.
- Speak at community organizations or volunteer fairs.
- Contact college or university departments about internship programs.
- Utilize word-of-mouth with current volunteers, staff or board members.
- Register with any on-line volunteer databases, local volunteer centers, corporate volunteer councils, Junior League, Executive Service Corps or school community service programs.



Targeted Recruitment

To design an effective targeted recruitment campaign, these are important questions to answer:

- Who might want to do the job and have the skills?
- What is their age and income range, sex, or personal situation?
- Where do they live, work, shop, play or socialize?
- Why would someone like this want to volunteer? Understanding motivation is key to developing an effective message. What message would reach your target audience? What is the best method for reaching them?
- How would such a person benefit from doing the job? What would be the most effective method of communication?

- What kind of message will inspire them? Why is this job important? What kind of impact can they make?

An example of a targeted recruitment campaign: A children’s hospital planned to start an evening parenting program at a pediatric primary care clinic in a highly diverse, urban neighborhood. Parent participants would be from the neighborhood, and staff wanted volunteers to work with the children while their parents were in class.

After much discussion with staff on the type of volunteer needed, why people might volunteer in this program and the benefits that could be offered them, it was clear the volunteers should reflect participants in diversity and have strong interests in children and parenting issues. Child development students at a city college in the clinic neighborhood were targeted.

The student body was highly diverse and motivated. Many were non-traditional, older students who had jobs, children and school, so were quite busy. But they were interested in good field work and training. The program supervisors would have to ensure the volunteers received a good educational experience. That would be the perk or benefit.

The strategy included meeting with faculty in the child development department and recruiting from their classes. Professors were thrilled with the possibility of their students getting good training and “hands-on” experience with professionals. The recruitment talks emphasized the training and vocational benefits to the students, the location near the college and the idea of helping the neighborhood. Many students signed up for screening interviews and all volunteer spots were easily filled.

While this was a highly successful targeted recruitment campaign, don’t think the story ends there. Additional recruitment was needed for the next parenting class because some of the original volunteers had conflicts or graduated. For most programs, recruitment doesn’t end. Just when you think all positions are filled, someone may leave. Recruitment, then, is an ongoing creative endeavor of figuring out where and how to recruit the right people to match the need.

“When you cease to make a contribution, you begin to die.” – Eleanor Roosevelt

Screening/Interviewing/Placement

The screening of new volunteer applicants is, arguably, the most crucial area of volunteer management. Going from volunteer candidate to actual volunteer means becoming an integral link in your organization, who will interact with clients (many of whom are from vulnerable populations), and/or the public and most certainly paid staff.

Screening is multi-faceted and can include a variety of tools such as the application, criminal background check, reference checks, health assessment (required in many health care organizations) and interviews. Each agency will have its own requirements that the volunteer program manager creates and these may vary according to the type of organization or volunteer job to be filled.

Screening implies that we rid ourselves of the notion that a warm body, ANY warm body, can do any volunteer job that might be available. This may mean a complete change of mindset for some. In practice, it means that volunteer program managers must be willing to forgo the first volunteer who walks through the door if he or she isn’t the right match for the job or the agency. Sometimes it means turning people away or redirecting them to other positions or agencies, which may be better-suited for their particular skill or interest.



Screening generally begins at the first point of contact with an individual. Often this is on the phone when a potential candidate calls to inquire about volunteering with the agency. Phone screening can be particularly effective in redirecting those who can’t meet the basic program or volunteer job requirements and it can also give an excellent first impression of the candidate. From there the decision is made whether to move on to the next step, be that scheduling an individual interview, screening orientation, or simply sending out additional information.

The interviewer, be they volunteer program manager or director, is the firewall between the outside world and the internal world of clients, patients or the public. It is the interviewer’s responsibility to ensure that those people coming into the agency as volunteers are a good fit with the organization, and that they are

well-matched with a suitable volunteer job that meets their interests and experiences as well as the agency’s needs. If candidates are not a fit with the organization and the job, innumerable difficulties may arise, not the least of which could be retention problems among the volunteer corps. A legally sound but probing interview and appropriate background checks can bring your agency’s incident rate down to zero, reduce recruiting by increasing retention and produce a truly effective volunteer staff.

The purpose of the interview is to get to know the volunteer candidate and their motivations for coming to your organization. Knowing the volunteer’s real motives will help you make the right match for them with your agency or redirect them to an organization more appropriate to their interests.

Some elements of a good interview include:

- Establishing rapport with the candidate. If you can quickly make the candidate feel comfortable and at ease they may be more likely to tell you all you want to know.
- Listening carefully. One of the most common mistakes novice interviewers make is to talk too much – about the agency, the volunteer program or job, even themselves. Make sure you listen more than you talk. And don’t worry about those awkward silences; the candidate always fills them with useful information.

- Asking open-ended questions that will give you specific information about past experiences and future needs, such as those below. These questions could lead the interviewee to reveal information about work, college, friends, or family that can't be asked about directly:
 - Why did you decide to call us?
 - What interests you about volunteering with us?
 - What experience do you have (with this population, in this setting, etc)?
 - Have you volunteered before? Where and what was the experience like?
- Watch for red flags. Every agency's red flags are different, but many worry about boundary issues, unrealistic expectations, lack of real commitment or interest.
- Try to determine the candidate's motivations and real interest in volunteering with you. Are they resolving their own issues, looking for affiliation with your organization, interested in vocational experience? The well-phrased question can unlock all these answers.
- Gain a sense of the candidate's temperament. This is crucial in determining the match.
- Find out what kind of training the applicant might need to perform available jobs.



"If you want to lift yourself up, lift up someone else." – Booker T. Washington

- Determine capabilities of the candidate (physically or emotionally), particularly if the volunteer will be working with a vulnerable population.
- Make sure the volunteer understands the requirements and limitations of the job.
- Evaluate special needs the volunteer applicant may have regarding such issues as disabilities, childcare, a time of the year or day he or she can't work, so that both of you have clear expectations.
- Talk about potential matches for the volunteer.

By the end of the interview, a clear picture of the candidate and their suitability for the agency should have emerged. If not, invite them back for a second interview. Do not accept anyone unless you feel comfortable. Remember, volunteers will have access to your organization, your clients and the public you serve.

Even if the interview was great, there are several elements of screening to complete. Second interviews with supervisors are often utilized as a screening tool. Criminal background checks, reference checks and, in some instances, health assessments are crucial. These can lower an agency's risk substantially and give the supervisor and volunteer program manager good information to make an educated decision regarding acceptance into the program.

Orientation/Training

Many volunteer programs opt to combine orientation and training because it is either more convenient or out of a misguided belief that they are one and the same thing. They are not. Orientation is general information about the organization, which includes the vision and mission of the agency and volunteer program, legal and liability issues, important policies and procedures.

Training, on the other hand, is specific to the job of the volunteer. It includes details about what the volunteer is to do when working in the position, from how to talk with clients to how to clean up after an activity as well as information about the subject area. So while there may be training items that cross over from one job to the next, each position must have a separate and distinct training. Orientation, on the other hand, should be general enough to apply to all jobs.

So, just as new staff go to a new employee orientation when they start a job, then get specific training from their departments, so too should volunteers attend a general orientation, then a specific training. This training and orientation can serve not only to prepare the volunteer for their role, but also to speak more eloquently about their experience and how it fits into the overall mission of the agency.

Generally, in a decentralized system, the trainer is the staff person who supervises the volunteers, while

in a centralized system, the volunteer coordinator might plan and do most of the actual training. Many programs have some kind of combined system in which each takes a part.

An orientation, which usually is done by the volunteer department staff, should include:

- Vision and mission of the agency and the volunteer program
- Policies and procedures, which the volunteer must agree to. These could include, among others:
 - Sign-in
 - Attendance
 - Visitors
 - Emergency Procedures
 - Recognition
 - Dress code
 - Confidentiality
 - Termination
 - Safety Issues
 - Legal and liability issues
 - Tour of the volunteer office space, where to hang coat, etc.

In training, the volunteer should:

- Learn how their work impacts the clients, vision and mission of the agency

- Learn about the population served, whether developmentally delayed seniors or attendees at an art museum.
- Learn about roles. Go over each section of the job description.
- Learn important information about the subject area. For example, if volunteers are working with developmentally delayed seniors they should learn about developmental disabilities and aging.
- Meet with relevant staff and learn about the volunteer's role with staff. To whom does the volunteer report? What department are they in? What are their expectations?
- Tour the volunteer's work area.
- Discuss all procedures, from recording hours to total time commitment, punctuality, absences and attendance policy.

Sometimes training is quite extensive and occurs over a long period of time. Sometimes all material can be covered in one session. Besides didactic methods, training can also include observational sessions or shadowing programs, in which a new volunteer follows a more experienced volunteer, for one or more work shifts.

It is excellent practice to document orientation and training. Have trainers prepare a standard checklist for orientation and one for the specific job assignment.

When complete, staff and volunteers can sign the checklists. These would go in the volunteer's file. If performance becomes an issue or policies are violated, documentation exists that the volunteer was oriented and trained.

Just as training and orientation really begin at the point of interview, when the coordinator can listen to the candidates' interests and needs and start telling them about the organization and available volunteer jobs, it doesn't end when the training session(s) are over. Good supervision is also a form of training with ongoing information passed to the volunteer that is specific to their experience.



“Learn to lead in a nourishing manner. Learn to lead without being possessive. Learn to be helpful without taking the credit. Learn to lead without coercion.” – Lao Tzu, philosopher

Supervision

All volunteers need effective supervision. The supervisor's role is to prepare volunteers to do their job and support them when they do it. Supervisors can guide volunteers, quickly nixing inappropriate behavior while encouraging work that is clearly beneficial. But as anybody who works in a paid position knows, a good supervisor is rare. And volunteer supervisors have an additional challenge. They must understand the special nature of volunteers' motivation, which can differ substantially from paid employees', in order to meet their needs and, hopefully, retain them.

Good supervision takes time. Too often in our agencies and organizations, we bring on volunteers (or even staff) without sufficient training or orientation, throw them into their jobs and walk away. With volunteers, this rarely works.

Think of volunteers as unpaid staff who need to know much of what employees know (depending on their position), but work only one day a week or several hours a month. Think how long it takes staff, working 40 hours a week, to become truly acclimated to a work environment and the challenges volunteers face come into focus. For volunteers, who usually work many fewer hours than a full-time employee, it can take months to become fully integrated and comfortable with the work, the staff and the surroundings.



Volunteers need supervisors who will ease that transition for them, who will take time with them after training, who will encourage questions. Volunteers often feel uncomfortable asking questions if staff is busy.

Frequent feedback conversations are important for ongoing supervision. These sessions may be as simple as a question, “How did it go?” and the volunteer’s reply, “great.” Or they can be as complex as a sit-down debriefing in which the volunteer relates intense interactions that occurred during the shift. In either case, they present perfect opportunities for coaching and relationship-building. They also give the supervisor a chance to informally recognize excellent work.

While time is the scarcest commodity for most of us, time invested upfront will pay off when volunteers feel connected to the agency and their supervisor, are effectively doing needed work and are committed to staying with the organization.

Some important elements of supervision include:

- The ability to establish a trusting, positive relationship with volunteers.
 - This means that the supervisor has done enough training and observation to have faith and confidence in the volunteer’s work.
- The ability to confront issues in a congenial, non-threatening way. In every supervisory experience,

there comes a time when uncomfortable issues arise. Maybe the volunteer does not come to work on time, maybe their interactions with clients are a bit off.

- Supervisors must be able to sit down and speak with volunteers, even if it is difficult. In those meetings, use specific examples of behavior, feel comfortable criticizing constructively and make sure to have the best interest of the volunteer and client at heart. It will show.
- Volunteers want to know their work is important and that they will be held accountable for their actions.
- Fostering open communication.
 - If they don’t hear from their supervisors, volunteers will constantly wonder if they are doing the “right” thing.
 - Feedback at the end of most shifts can elicit open communication and, with good listening skills, the supervisor can gain insight into the nature of the volunteer’s interactions.
- Recognition and appreciation of a job well done.
 - Just as volunteer program managers must be able to confront issues, they also must be free with praise, recognition and appreciation.
 - The easiest and, often, most appreciated recognition is a simple “thank you” for a specific

“Everyone can be great because anyone can serve. You don’t have to have a college degree to serve. You don’t even have to make your subject and verb agree to serve... You only need a heart full of grace. A soul generated by love.”

– Martin Luther King, Jr.

action. It can help volunteers feel “seen,” that they are not working in a void.

- Utilizing volunteers’ special talents. This makes them feel useful and special.
 - Most volunteers will come with an interest area, but many will have special talents and abilities. Not all of these are professional skills, but may be as simple as having a special knack for rocking a baby to sleep or organizing a large group for a park clean-up.
 - By getting to know the volunteers and taking a personal interest in them as people, volunteer program managers can bring out skills and talents that will benefit the agency.
- Empowering volunteers to do their work.
 - No one likes to be micro-managed and volunteers are no different. Train them well. Plan ongoing feedback, recognize their work and let them go.
 - They will not do the work the way you would. They will have their own style. But if it’s productive and appropriate, who cares?
 - It’s difficult to relinquish control, especially when the supervisor is responsible for the work. But that is the great challenge of the supervisor: to be ego-less, not threatened, and to push people forward into the limelight.

Evaluation/Termination

Volunteers want to know that the work they do is important and meaningful to the agency. They need validation if they are doing a great job. They need to know about potential performance improvements. They need the chance to hear their supervisor’s formal assessment and evaluate themselves or the program. This says to them that their work is important enough to evaluate. Supervisors, meanwhile, can use the evaluation session to continue to shape behavior, and volunteers can continue to improve their performances.

The agency, too, stands to benefit from regular assessment by volunteers who are, by definition, both internal to the agency and external. A self- or program evaluation, included in the process, will give supervisors and other agency staff the opportunity to see how they are perceived by volunteers, how the program seems to be working and if the volunteers feel well-trained and comfortable in their roles. It gives staff a chance to revisit their orientation and training content and supervisory technique.

The annual evaluation should not replace feedback sessions that focus on specific incidents during the week or month. Nor should it be a punitive process. If there has been effective supervision and open communication, there should be no surprises for either the volunteer or the supervisor during the evaluation.

Volunteers should be apprised of the evaluation

process during orientation and training. The person who is most familiar with the volunteer’s work should conduct the evaluation. Most likely that person will be the supervisor. In a decentralized system, the volunteer program manager is not the supervisor. So if there are specific improvement issues to discuss during the evaluation meeting, staff supervisors should meet with the volunteer program staff first to discuss the evaluation meeting.

It is easiest to use an evaluation format that covers a variety of areas and is general enough to apply to many volunteer jobs with room for comments on specific skill areas. Evaluation topics should relate directly to the position description since it is the basis of a fair performance evaluation. It is a good idea to have a mechanism in place for obtaining comments or feedback from staff other than the supervisor who work with the volunteer.

Create a simple evaluation form. Sometimes a checklist with room for comments is easiest. Topics should cover the volunteer’s skill at doing the job and accomplishments within the job. A numerical ranking isn’t even necessary. Some evaluations simply allow answers of “performs satisfactorily” or “needs more training.”

Include questions on:

- Quality of Work
 - Thoroughness in fulfilling duties
 - Timely completion of assigned tasks
 - Able to determine when to identify, refer and/or solve problems
 - Interactions with clients, patients or the public
- Attitude
 - Flexibility
 - Dependability
 - Attendance
- Communication
 - With staff
 - With clients
 - With supervisor

Just as you would for a staff performance evaluation, it is best to start the evaluation conversation by listening to the volunteer’s thoughts on their

experience and performance over the previous year. Don’t get defensive. Non-judgmental listening will give the supervisor valuable information on the volunteer’s perceptions, which can benefit future program development.

When the volunteer is finished, the supervisor has a chance to discuss performance. Beginning with negative comments is ill-advised. Even volunteers with improvement areas usually do some things well. Try to find the positive and emphasize it. Then move on to problem behaviors. Most supervisors dread this discussion, and it can be difficult. But it is easier if supervisors reframe the process to emphasize improving behavior, making the experience better for the volunteer, the supervisor and the client or public.

Supervisors should be direct with the volunteer, specific about the problem and expectations. Phrasing problems in terms of potential consequences to clients, the public image of the agency, team or staff can be helpful. Most volunteers care deeply about the agency and its mission, hoping to help not hurt the mission.

The job description, training checklist and orientation materials can also help in explaining expectations. Make sure volunteers know what kind of improvement is expected. While volunteer satisfaction is important, appropriate interactions with clients and/or the public are any staff member’s primary responsibility. These appropriate interactions will be more enriching,

ultimately, to the volunteer. Say to the volunteer, for example, “If you were to sit on the floor with the children to play with them, rather than on the couch, your experience here would be much more rewarding.”

On the other hand, if supervisors listen first, put themselves in the volunteer’s shoes and frame thoughts as discussion rather than ultimatum, some surprising things may emerge. Maybe the volunteer doesn’t really like the assignment, but has been too embarrassed to say it. A better match might solve the problem. Maybe the volunteer truly doesn’t understand the expectations of the position or the repercussions of the actions. Maybe what they want to do as a volunteer with the agency is something that just isn’t possible. All these revelations are positive and the supervisor, along with the volunteer, can decide how to change the situation or behavior.

The evaluation discussion should be documented, and both the supervisor and volunteer should sign the form. While the problem evaluation is challenging, with good screening, orientation, training and supervision, they are rare. Most volunteers are appropriate, committed workers who do a phenomenal job aiding the organization in ways paid staff just can’t.

Performance Factors

	Poor	Good	Excellent
Quality of Work	☐	☐	☒
Quantity of Work	☐	☐	☒
Initiative	☐	☐	☒
Adaptability / Versatility	☐	☐	☒
Cooperation/Relations	☐	☐	☒
Dependability	☐	☐	☒
Communication Skills	☐	☐	☒
Supervision / Leadership Skills	☐	☐	☒

Factor % x Performance Level number = rating
Add ratings for all eight factors to determine overall rating for merit increase

“Our deeds determine us, as much as we determine our deeds.”

– George Eliot

Recognition

Volunteer program managers agonize over recognition. And well they might. While it takes work and creativity, recognition is the only paycheck volunteers receive, besides the satisfaction of their work, and it can motivate in many ways.

Good recognition is a matter of common sense and thoughtfulness. It is not a strategy for discharging obligations. Recognition also is not something that happens once a year. It’s an ongoing, often daily, process of noticing what has been done and commenting on it in some way, saying thank you in appropriate ways that are meaningful to the volunteer.

There are two types of recognition: formal and informal. Informal recognition often consists of a simple “thank you.” Seems pretty easy, but with busy staff who may be unschooled in essential volunteer management, it can be a rare occurrence. Thanking volunteers is much more effective when it’s specific to a particular job done that day and informs the volunteer of the results of his/her work. For example, “Thank you for the work you did with Joey today. His math skills should really improve as you continue your tutoring.”

Informal recognition can also include writing a personal note to the volunteer about a job well done, writing a recommendation letter for a salaried job or training the volunteer for promotion, which makes them feel validated and appreciated.

Some additional ideas for informal recognition include:

- Challenging your volunteers with meaningful work
- Recognizing their personal needs and accommodating them when possible
- Smiling and being pleasant
- Sending a birthday card
- Greeting them by name
- Training and orienting well
- Giving additional responsibility if growing out of job
- Allowing input in planning
- Enlisting them to train volunteers

Formal recognition is generally done for all volunteers equally, on a regularly scheduled basis. Some agencies recognize their volunteers based on anniversary, some on hours. Some give a formal banquet, others distribute pins or plaques. Whatever is decided at your agency, you should ask yourself: Why are we doing this? Is this something all the volunteers will really like and appreciate? Who should be recognizing the volunteers? Are we really organizing this for ourselves or is it truly for the volunteers and their supervisors?

Continually evaluate and reevaluate recognition events. At one agency, a typical, off-site banquet was the annual recognition event for years. While the music and food were always good, only a fraction of the volunteers ever went and those were always the



longest-term or most involved. Supervisors in this decentralized system were not invited even though they had the greatest daily contact with the volunteers.

One year, the volunteer department staff sat down and asked themselves the questions above. They realized that recognizing supervisors was crucial and they wanted more volunteers to attend recognition events. They opted for a week-long, on-site celebration that brought supervisors and volunteers together for lunch (served by volunteer department staff) on the day they came in to volunteer. It promoted the relationship between the volunteer and the supervisor. It was more work for the volunteer department staff, but actually less expensive, higher profile internally and reached 100 percent of the volunteers.

Here are some ideas for formal recognition:

- Give a pin, plaque or certificate to commemorate the anniversary or number of hours given.
- Plan a banquet, luncheon or party on- or off-site
- Nominate volunteers for service awards, such as Points of Light Awards
- Include volunteers in media interviews
- Plan special celebrations for benchmark anniversaries (5, 10, 15 years)
- Have volunteers included in employee recognition events

Retention

To retain volunteers, ensure they are satisfied with their experience. If their motivation and interest in volunteering are met by the assignment, supervisor and organization, volunteers will remain with the agency unless life circumstances force them to make a change.

Each volunteer, though, will have a different set of needs, a different reason why they volunteer, and different motivation. So the most important element in developing satisfied volunteers is creating a good match for them with a job that meets their interests and needs. The interview process is the point when volunteer program managers must probe to understand why the candidate wants to volunteer. And from this information, the manager will know whether the agency has a job that is a good match.

Effective supervision and sincere recognition are other key elements in retaining volunteers. If these pieces are in place, the volunteer will be doing what they want to do with a supervisor who understands and appreciates them. It will eliminate the common volunteer complaint that they rarely see their supervisors or they don’t have enough to do.

Many volunteers also need to feel a sense of the whole, that how they are spending their time connects to how the overall mission of the agency is affecting the client, even the world. Many young working people

who volunteer are looking for fulfillment above and beyond what they get from their paying job in the business world. Others want vocational experience. Still others need basic interaction in their lives and are motivated by a desire to affiliate or belong to a place or group of people.

According to a research study published in the *Journal of Volunteer Administration*, and cited by Rick Lynch and Steve McCurley in their book “Volunteer Management,” the top 20 factors that are important to volunteers are:



1. Helping others
2. Clearly defined responsibilities
3. Interesting work
4. Competence of supervisor
5. Supervisor guidance
6. Seeing results of my work
7. Working with a respected community organization
8. Reasonable work schedule
9. Doing the things I do best
10. Suitable workload
11. Freedom to decide how to get work done
12. Chance to make friends
13. Pleasant physical surroundings
14. Opportunity to develop special skills/abilities
15. Challenging problems to solve
16. Convenient travel to and from volunteer work
17. Opportunity to work with professional staff
18. Volunteer recognition
19. Adequate reimbursement of out-of-pocket expenses
20. Chance to move to paid employment

Of course, with the mobile nature of our society, the increasing interest in short-term volunteering, high school community service requirements and corporate group volunteering, retention isn't always possible or even desirable.

Sometimes the people who want to stay are really the people who should leave – those people who continue to volunteer out of habit rather than desire, are unwilling to improve or update their job performance, or who are overly invested in the program or clients and cross boundaries or upset the balance between helping others and helping themselves.

Striving for retention won't benefit the program in these cases. Being comfortable letting people leave will.

For the most part, though, investing in retention is investing in program. It reduces recruitment, endless screening and retraining. And long-term volunteers often have a high investment in the organization's mission.

Appendix – Resources

This resource list has been edited and adapted from the bibliography in *Volunteer Management: Mobilizing All the Resources of the Community*, (Downers Grove: Heritage Arts) 1996 by Steve McCurley and Rick Lynch. An extensive and comprehensive bibliography, compiled by McCurley over many years, can be found online at www.energizeinc.com.

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