



## Program Planning

Instituting a new volunteer program or reenergizing an existing one involves a process that covers a range of management functions—from needs assessment, volunteer position development and recruitment, to supervision, evaluation and recognition. Together, these interdependent processes create a synergy that will enliven your volunteer program. Once instituted, an effective approach to volunteer management will perpetuate itself.

Planning a volunteer program within an organization means changing standard practices and routines. Funds must be acquired and budgeted, relationships must be formed to link the volunteer program into the organization, job descriptions and working relationships must be modified, and policies must be created and approved to accommodate care recipients.

There are many advantages to establishing a volunteer program beyond that of accomplishing critical tasks with limited funds. Involving community members in volunteer programs increases public support and helps them understand the work and planning behind management decisions. Volunteers help expand existing programs beyond limits imposed by personnel ceilings and budget constraints and enable more efficient project workflow. Instituting a volunteer program is not easy nor can it be done instantaneously. Planning a volunteer program includes job development, interviewing, supervision, evaluation and recognition.

## Needs Assessment

When planning volunteer programs, first conduct a needs assessment of the local communities to be served and then decide whether or not your program can help meet some of those needs. Organize a half-day retreat centered around the question “If we had more time or expertise, we would . . .” This exercise can help you create a more abundant selection of volunteer opportunities that address the important organizational needs your staff cannot currently address. This will help you realize the potential of professionals and help staff view volunteers as a resource and not competition.



## **Questions to ask before conducting a needs assessment**

1. What is your organizational vision and mission?
2. What are you trying to accomplish in your community? What is the program's purpose?
3. How do volunteers fit into the program's mission, strategies and goals?
4. How could volunteers best meet the program's needs to serve more people and make a greater difference in the community?
5. How can volunteers help meet program goals?

**The Purpose Statement:** A written statement that explains the object for which anything exists or is done or is made

Example: The purpose of the Grand View Food Bank Volunteer Programs is to coordinate the distribution of donated food to those in need in the community through the efforts of volunteers.

## **Whom to Ask**

Incorporating a volunteer program into an organization can impose many changes in the jobs and working relationships of paid staff. A joint planning process involving organization leaders, staff, board members, care recipients and current volunteers is vital to understanding each party's needs and perspective. The parties work to overcome differences and reach agreement on how the volunteer program can be most effectively designed, organized and managed to pursue its mission and goals

## **Who has a stake in strengthening or starting your volunteer program?**

- Staff
- Current volunteers
- Clients and program participants
- Community organizations
- Advisory groups
- Potential volunteers



## *How to Gather Information*

There are several methods for conducting a needs assessment—interviews, telephone surveys, mail surveys, focus groups, e-mail and web surveys. The chart in Appendix A weighs the pros and cons of the different methods.

### *How can I determine our volunteers' needs?*

- Interviews
- Tests
- Surveys
- Focus groups

**Content analysis:** Framework for analyzing existing information

**SWOT analysis:** Framework for analyzing strengths, weaknesses, opportunities, and threats

Volunteer programs should select a method for conducting a needs assessment based on internal resources, staff time and community resources available.

In an organization that has paid staff, a volunteer coordinator should begin the process of creating volunteer jobs with the help of other staff members.

Volunteers are best utilized with staff support, so the volunteer coordinator should consult with staff when developing a volunteer

program. It is important to engage staff by discussing the needs of the program as and where they are having problems reaching their goals.

## *Questionnaire to assess staff attitudes*

### *Experience level of paid staff working with volunteers*

- Have they supervised volunteers before?
- Have they worked in agencies that involved volunteers?
- Do they volunteer at other agencies?

### *Comfort level of staff working with volunteers*

- Are there positions that staff feel volunteers should not be doing?
- Are there program elements, such as additional staff training, that should be instituted before volunteers are placed?



## *Anxiety level that staff feel toward working with volunteers*

- Are there risk management issues?
- Are there worries about loss of staff jobs?

## **Volunteer Advisory Committee**

Another model and an excellent use of volunteers is a volunteer advisory committee organized specifically to benefit the volunteer program. It supports the volunteer program and provides advice.

*Recommendation:* The position description for advisory board members should clarify that policies about the volunteer program are subject to approval by the Board of Directors. Advisory committee members should understand that their role is not to give orders, but to advise and assist.

## *What do I do when I have compiled the results?*

- Make a list of the benefits that can be created for the organization, its mission and the people it serves by involving volunteers in specific ways.
- Share the results with those who can help build or rebuild the volunteer program.
- Use the information to guide your unit in the planning process to improve or create a volunteer program.
- Draft project descriptions with clearly stated goals and objectives and engage volunteers in designing the implementation strategy.
- Design project-based volunteer opportunities that reflect the long-term volunteer involvement your organization desires.
- Consider what short-term, high-impact projects you can create that will make use of the skills volunteers can provide.
- Explore volunteer position sharing and team volunteering options when developing projects.
- Think creatively about projects that could be done by groups of volunteers at various times throughout the year.
- Design and frame volunteer projects as if you were engaging consultants or project managers. Let volunteers play an active



role in setting project goals, procedures and timelines to increase their commitment.

- Provide opportunities for advancement. Reward increased commitment and accomplishments with increased recognition and responsibility.
- Ask volunteers what skills they wish to develop or competencies they need to demonstrate.
- Develop a volunteer track for volunteers specifically looking for continued and increased involvement.

## Mission and Vision

Effective volunteer program planning begins with the mission of the program. As a volunteer coordinator, you hold an important key to turning the mission into action. It is your job to develop and fill volunteer positions provide the services and care highlighted in the mission. Volunteer programs, therefore, facilitate the kinds of volunteer participation that will allow an organization to accomplish its mission. Even for established programs, revisiting the mission statement can be helpful when considering an expansion of services or when changes occur in the population or geographic area served by the program.

### *Example of a Mission Statement*

The Mission of the Grand View Food Bank is to provide surplus, gleaned, donated and purchased food to the poor.

Mission statements can talk about meeting a need, solving a problem, or defining an organization's purpose. An organization's mission statement is usually no more than a brief paragraph that pinpoints the specific reason(s) for being.

Often an organization will also have a stated "vision" that expands on the mission with a description of a desired future. The vision is a mental image or view of broad elements that an organization or program wishes to accomplish, based on its mission. The vision



clarifies the future the program is trying to create. It has been found that a program's volunteers are most effective when there is a broadly understood and widely articulated vision of the role of volunteers in fulfilling the program's mission. When considering a direction for your volunteer program that is based on your organization's mission and vision, revisit the questions on page 2 of this document.

Use the answers to these questions to help you outline a strategy for using volunteers. Consult with volunteers, staff and others—such as coalition members and board or advisory committee members—who know and understand the organization. Together you can devise a mission-based strategy for working with volunteers.

### *Example of a Vision Statement*

The Grand View Food Bank was organized to address the issue of poor nutrition and hunger among those living in poverty in the town of Grand View. The organization mobilizes volunteers and staff to acquire surplus food-stuffs that can be given to the hungry. It also works to educate anyone interested in the rudiments of healthy eating.

## **Volunteer Program Tracking Systems**

Most volunteer programs have a large computer database with addresses, hours served, awards presented and other vital information. The most direct means by which computers can streamline the management process is with the use of a volunteer database, which can be created from software programs such as Microsoft Access, Microsoft Filemaker Pro, Microsoft Excel or Lotus Approach.

### ***Steps to ensure an effective database***

- Create a Records Advisory Team. This can include volunteers who use the database or have knowledge about databases.

# Starting a Volunteer Program



- Create a written process for working with the database. Written documents about database instructions reduce errors.
- Assign a record-keeping king or queen. While several people might be updating records, one person should take the lead and report to the volunteer coordinator.
- Train, train, train. Volunteers using the record-keeping database are less likely to make mistakes if they are trained. As the program improves, provide upgrade training for volunteers using the database.
- Limit database access. Only trained volunteers and trained staff members should have access. It is easy to do this by using the security parts of the program in the database. The record-keeping king or queen should be in charge of access.
- Clean up. Many volunteers serve in more than one capacity, making it likely for them to appear more than once in the database. There should be a regular system for eliminating duplicates in the records and checking the accuracy of the information you have.
- Stay on top of Input. Keep the database viable by timely input of data. This job is ideal for teens or college students in computer classes—under the supervision of the record-keeping king or queen. A good database is only useful when updated regularly.
- Produce a maintenance schedule. Most databases systems have ways to identify problems. Establish a check-up system.
- Think disaster. Organize a disaster plan. Back up records once per month in an off-site location, e.g., ask your software vendor for suggestions and/or involve technologically savvy volunteers in this planning.

Originally published by the Points of Light Foundation in 2004  
Revised by HandsOn Network in 2010