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Learning Lab - Essentials: Volunteer Management Transcript

Welcome – Autumn

Hello, my name is Autumn Lee and I am the Communications Director at the Nonprofit Center of Northeast Florida. Thank you for joining us for this Essentials training. This series is designed to cover fundamental, wide-ranging topics in an accessible manner that allows organizations of all sizes and backgrounds to participate and engage. As a valued member of the Nonprofit Center this series is included in your membership and accessible to you and your organization at no additional cost.

Over the next 30 minutes you will hear from a Nonprofit Center staff expert and learn more about how you can take these learnings back to your organization to help you in the important work you do for our communities. At the top of this page, you will find additional tips and tricks for getting the most out of this session. You will also find any referenced handouts or materials in the “downloads” section directly below this video.

With that, let’s get started!

Volunteer Management- Callan

Thank you again for joining us today for our Volunteer Management Essentials. We are excited to be bringing you this presentation in this virtual, pre-recorded model as well as in our virtual, live format. If you are curious about when the next live session will be taking place, make sure to check out our Programming and Events page.

For today’s session we will be spending our time:

- The Who, What, and Why of Volunteering
- Discussing how to create meaningful volunteer opportunities and how to communicate our volunteer needs



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- And then we'll look at managing volunteers and provide you with some resources and tips for brainstorming your next steps around volunteer practices at your organization.

All of the work we do and resources we develop here at the Nonprofit Center are created through the lens of our Stronger Nonprofits Framework. This framework outlines our capacity-building philosophy and defines the core pillars we believe are foundational to an organization's success. Those pillars consist of:

- High-Performing Leadership Teams
- Organizational Learning and Measurement
- External Awareness and Advocacy
- Access to Capital, which includes not only financial resources but that of human capital as well which adds to the overall strength of a nonprofit organization.

Volunteers really fall into all four of these pillars – strategy for community engagement and feedback looping, part of our organizations pipeline for leadership, and can play a major role in advocacy and help us stay connected to environmental factors that impact the organization.

For more information on our Stronger Nonprofits Framework please visit our website.

Defining Volunteerism – Callan

To ground us first in what volunteering is, we are generally talking about some sort of time, skill, energy that benefits the public good and are not expecting any reimbursement for this participation.

There are different ways to volunteer in nonprofit organizations. Board volunteerism is governance-based and longer term (usually 2 or more years), and they're really focused on vision, mission, strategy and policies of the organization, and have that fundraising responsibility, and legal and fiduciary oversight.

Today we're not talking as much about the board experience, but we will be focusing on this left-hand column – general volunteerism that is usually project-



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and time-based, with very little legal responsibility and easier to commit to for the general public.

The Who, What, and Why of Volunteering

Nationally about 30 percent of the population volunteers. Florida ranks 50th in volunteering among states, but Jacksonville has a slightly stronger showing as 33rd of 50 large cities (higher than Orlando and Miami). We have about 270,000 volunteers each year, and Florida ranks 7th among veteran volunteer rate. We know women are more likely to volunteer than men, and the more educated someone is, the more likely they are to volunteer. There is some financial gain potential here, as about 80 percent of volunteers also donate to the organizations. Volunteerism has potential to transform into other forms of support for the organization.

Volunteers are truly not just nice to have; the volunteer workforce complements paid staff with their talent and skills, acting as brand ambassadors with diverse viewpoints and networks that bring more support to your mission.

If we look at the dollar equivalent of lost volunteer time each year in Florida, assuming one-third of volunteers don't return the next year and that the current dollar equivalent of a volunteer hour is \$26 per hour, we lose about \$2.7 billion per year. It is really important to try and retain and grow our volunteer numbers each year, because trying to make up that gap is going to be really difficult to do.

When people tell us why they volunteer, we hear that they're looking for that good feeling of giving back or building their network. Volunteering is associated with 27 percent higher odds of employment; they keep skills active and are able to learn new things. Ultimately, you want a diversity of opportunities to address the different motivations volunteers have and needs of our target audiences.



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Does it fit into our vision, our mission, and our values? Similar to grants, we don't want potential mission creep just to get people or funding in the door. What are we trying to accomplish and what is our strategy, and how can volunteerism get us there? That's what we really need to think through when we're building a volunteer program.

How to create meaningful volunteer opportunities and how to communicate our volunteer needs

Think about the current way you use volunteers now. Are there things on your wish list? If you could find the right volunteers, what would like them to do? Are there growing areas of your organization based on a new strategic plan where you could embed new volunteer experiences? Are there barriers internally or externally that keep you from having strong volunteer experiences? These questions could be a great brainstorming exercise for your leadership team and your board; challenge them around questions like "hey, maybe we need an overhaul of our current tech system" or "maybe we need someone to come in and do translation work for one of our programs" or "maybe we need someone to come in train our staff on something particular." Have you thought about how volunteers can be used in these different ways instead of how we've traditionally used them?

Planning for volunteer risks up front is also extremely important. These five questions can prompt a good starting place, especially these days with having a more litigious society, we want to protect our people and our organization.

- How much trouble can volunteers really get into?
- Are we responsible?
- How bad can the damage be?
- What are the chances of something actually happening?
- Is insurance the same thing as risk management?

Take a step back and think about if you have a plan in place to address the risks that volunteerism can bring to an organization.



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When thinking about mitigating risks, we're going to talk most about planning, screening, training and supervising our volunteers. There are a few other things to think about, though, if you don't already have them in place. Do you use a volunteer waiver? If not, you might want to check that out, or volunteer accident insurance especially if you have folks onsite, as well as remote opportunities that require privacy, safety and hacking protections.

When thinking about interns and using staff as unpaid volunteers, these are both covered by Fair Labor Standards Act; you can find a link in our resources with more information about this. Interns can be unpaid but be careful when using the word *stipend*; this could get you and the intern in trouble if it's seen as compensation. Make sure it is additional work that wouldn't normally be covered by a paid employee. Paying for internships also gives you a more diverse pool of applicants, so consider your policies and practices when using an intern model. Sometimes volunteer interns are not covered under typical insurance. Generally, staff must be compensated for their time if doing any work for their employer; however, if you have volunteer service that is not the same type as their paid role, the employer cannot coerce or force the employee to volunteer but the employee can choose to volunteer if it's not something they would typically be doing.

Volunteer job descriptions really help with planning and screening. It might seem like a tedious task but this is an essential step for finding the right people AND being able to hold them accountable. Think about what skills are required, how to coordinate volunteers and the expectations at your volunteer site.

You'll want to plan out your screening needs before you begin recruiting any volunteers as this can be a heavy task. Depending on what your organization does, you might already have specific requirements, especially if you work with minors. However, if it's not required by an outside institution, it's still important to think through on your own. You might have different criteria based on different roles they are performing. Is it an administrative task or are they offering some sort of direct service? And are there are equity concerns around background screening as well? We can determine what is important and vital for the role – for example, do we care about a 15-year-old DUI? Maybe, if they're driving folks around. We also



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need to have a written procedure for the steps to screening, so that both externally and internally people know what to expect and what the next steps are. Obtaining permission first and foremost before running a background screening is of utmost importance, and of course we need to act quickly if they fail a screening.

This is a worksheet for you to think about your current or potential volunteer opportunities, and especially how you can change them or update them to fit your needs. Is it interesting and engaging for an individual? And is it supportive of the mission? Does it provide a relationship experience of some sort? And can you keep the volunteers safe during it? Here is where you might want to add in some virtual opportunities, which we will walk through in just a little bit.

I encourage you to think about volunteer recruitment as a resource raising activity – one that is just as important as raising cash. Remember, volunteers are more likely to donate and the resource of human capital is vital. Think of how you could put an ask out to your current volunteers to bring new volunteers into the mix. Are there places where an organization can post the opportunities so people can find them? Of course you want to make sure all of your posting sites are as up to date as possible. When using so many different recruitment portals, it can be easy to get behind and have outdated listings out there.

Recruitment has to be a top priority on your to-do list. Do the brainstorming and follow through required: Think about your organizational culture – people give to the people who ask and the same goes for volunteers. We must ask, and utilizing a commitment form can make sure they understand the expectations. And while it might be faster in the short term to utilize the same go-getter board member, you are more likely to increase their potential for burnout, and the goal is always to expand our network and the people that know and love us.

Finding volunteers is always a challenge. Word of mouth will always be one of the most powerful ways to do this. There are many virtual platforms as well; for example, Catchafire connects skilled volunteers with specific projects you might have, such as writing a new business plan. We also always hear about families seeking opportunities to volunteer with their children, especially young children, so



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think about what opportunities you have for getting little ones and their parents involved. If you have a company that comes to do a work day, make sure you connect with those individuals as well so you can follow up with them on other events and programs. Look at what's worked well for you in the past, and talk to colleagues to see what they're using and what's working for them.

When tabling there are some easy pointers to keep in mind such as where to set up. Usually set up by an entry or exit way or even near a bathroom. You want to be somewhere with plenty of folks will be walking by, and you want to have collateral that catches their eye and pulls them in, such as a really graphic tablecloth or banner and fun promo items, of course plenty of business cards and brochures, and a small cart for transporting materials to and from the event. Having an urgent call to action is important; you want to have one thing for volunteers to focus on and remember, and make sure you have a sign-up sheet. People love taking pictures if you have a backdrop or prop to encourage people to take a picture and share it on their social channels to get other people involved. Also, don't be afraid to refer folks out to other organizations; there's always going to be someone who has an interest that doesn't really align with what you're offering, but you might have a colleague in the sector who can give them an opportunity. Be a nonprofit sector promoter!

Managing Volunteers

Think about the phrase "knowledge philanthropist" vs. "unpaid staff" — what does that really mean to you? How do we value someone who has knowledge and philanthropy instead of an unpaid staff member? How do we manage and retain donors and staff? A "knowledge philanthropist" is a person who wishes to share their knowledge for the benefit of humanity. These Philanthropists exist in all walks of life, and the legacy such a philanthropist gives is seldom rewarded or noticed but is a central ingredient to the knowledge and the working of the organization and helps make our community a better place. How can we treasure all of our volunteers as these knowledge philanthropists? You want to make sure to match volunteers well. Keep in mind general labor volunteers have about 53 percent retention, whereas professional or management volunteers have a higher retention, around 74 percent. You want to be able to align volunteers with the skills



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they have and that the organization needs. Follow-up and feedback for volunteers is a critical component of keeping them engaged with the organization.

One tool you can use is a volunteer profile. This can be a great intake procedure for your organization; ask volunteers what is that you want to do? What time do you have? What skills do you bring to the table? Getting that info from them first and seeing what you have could really help make a match. It's not about creating a brand-new job for everyone that walks through the door but giving you the opportunity to visualize how this person can be an asset for the organization.

Volunteer orientation is usually our first impression for new volunteers and it's also their first impression of us as an organization. As an example, the Jacksonville Humane Society has a strict orientation requirement because they need to know safety procedures and how to work with animals. So thinking about your organization, what is really required from a volunteer orientation and training? No need to make up stuff just for folks to attend because you don't want to waste their time or waste time as nonprofit staff members, but consider if there's a specific event or a specific set of policies and procedures they need to know before working with the organization. Maybe it's virtual or a pre-recorded video they must watch — use technology to your advantage so you're capitalizing on the time you have to get the work done and get volunteers in place. Include language like, "Please refer to our website which has all of our current volunteer opportunities and the volunteer application process. For any additional questions please email or call." Utilize the tech you have available to save time and give volunteers an immediate way to follow up if they're not able to connect with you right away.

We know that 40 percent of volunteers stop volunteering because of poor management practices. Connect volunteers with mentors, and don't be afraid to provide feedback and recognition — volunteers want to know how they're doing. Perhaps there's the opportunity to recruit folks in pairs, to make it easier to break the ice. You can also rely on things like a volunteer "go bag" for events or programs, or other easy ways to support volunteers by providing items they might need/want and haven't thought to bring with them.

Some "Go Bag" ideas:

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- Sunscreen or mosquito repellent
- First aid kit
- Phone charger
- Tools, depending on the event
- Extra waivers and sign in sheets for volunteers who bring a friend day-of

It helps to have a media kit on hand with photo releases, talking points, brochures, business cards and additional volunteer opportunities or ways to connect with the organization.

There are a lot of ways to support volunteers, whether that's formally through reviews and feedback or informally through connecting them with resources they might need at an event — there's always ways that we can be better supporters of the people who are helping us out.

Now more than ever, people are engaged with virtual work. There are so many benefits of remote opportunities:

For the volunteer: Remote opportunities give them an additional unique way to support the organization without leaving home, or allows them to provide service despite disability, travel or work hours.

For the organization: Benefits of extending resources, engaging with a new group of volunteers, removing time and physical barriers. Remote work also shows that we're a modern nonprofit that's accommodating to volunteer needs. It's also efficient and environmentally friendly.

There are many ways to engage people in remote volunteer opportunities: Database entry, tagging photos, editing videos, planning, reading/editing, research, social media, PR — the opportunities are really endless. It's time for nonprofits to take advantage of that and look at what's needed to decide if there's a way to make something into an easy-to-digest, virtual opportunity.

Of course major events are another big way to engage people with a nonprofit mission. When you look at major events, it's really all about communication. For



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example, if you were walking into an event, what would you need to know without having that staffer's inside knowledge? Things like where to go, volunteer job description, how many people are needed at what location, designated attire — think about their whole volunteer experience beginning to end and what they need to know, and always keep in mind how to support them.

Creating a volunteer manager can be beneficial for your organization. This role can be paid or unpaid, but really think about what it would take to be an unpaid volunteer manager. It really does take a special person that likes this kind of work. They should be organized, people oriented, maybe a long-term volunteer looking for some additional responsibility.

When creating a volunteer manager position, think about what skills and assets they really need to have to connect with other folks and get them motivated as well.

Allowing time and space for folks to make connections with one another is really crucial to a good volunteer experience. Cliques can really kill the motivation new volunteers bring to your organization, and we know just one bad experience can really scare folks off so they don't want to return again. Have people engage by giving them opportunities to connect with one another.

People really want a reminder that their work meant something, so you can send photos after service or an event, or just ask them to come back. Following up with volunteers after service is something that not enough nonprofits do — constantly keep in touch with new programs and opportunities to get involved.

Remember, bonding is important even in a virtual setting. It can be as simple as a volunteers-only time after an event, giving people a chance to connect and follow up.

Recognizing service is really important when it comes to volunteers — always start with a thank you that's individualized as much as possible. There are lots of ways to recognize volunteers and can start within the organization, maybe bringing them into a board meeting or staff meeting and sharing the work they did. You can also recognize them to the community through a program like the Association of



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Fundraising Professionals' National Philanthropy Day or the Senior Golden Years Gala or Reinhold's Celebrate Clay Awards in Clay County — there are so many ways you can nominate volunteers for special awards and recognition.

Individual recognition and appreciation is so important to let volunteers know how important their service was. So much of our work in the sector is about relationship-building — with staff, with donors, with board — we can't forget the role volunteers play in this work as well.

I know trainings like this can sometimes be overwhelming, but I encourage you to think about how you can get started, even with just one action item or change that might strengthen your volunteer program. So now it's your turn! Here are some options, pick one and make a plan to follow through thinking about specifics like:

- Who is going to do this? By when?
- What resources or support do we need to make this happen?
- What's the overarching goal of our volunteerism program?
- How to make this a better experience for not only for volunteers but for us as nonprofit staff?

Here are some resources to check out; we will link these under the Resources section and don't hesitate to reach out if you're looking for some additional support in this work.

With that, I want to say thank you so much for joining me today for this Volunteer Management Essentials! This is my contact information so please feel free to reach out to me with any questions or comments you have: CBrown@Nonprofitctr.org, 904-425-1185

Close-out: Autumn

That was great! Thank you for joining us for this Essentials training. We can't wait to see how you take this knowledge back to your organizations! Be sure to fill out the short survey at the bottom of this page; your feedback is important to us! To learn more about what we do at the Nonprofit Center, follow us on social media — you



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See you next time!