

The 4 R's of Volunteer Management Toolkit

An initiative of Texas Health and Human Services

Why have volunteers?

Volunteers can provide new life to a program's mission by sharing their ideas on how to help the program grow, as well as by doing tasks that employees simply do not have time for. Whether your program has had volunteers for a while or is just getting started, this toolkit was developed to help managers recruit, retain, recognize, and build relationships with their volunteers. Please contact us if you find that you have any questions about this toolkit, or if you want to share your ideas. Contact information can be found on the last page of this toolkit.

Program Developmentⁱ

Below is a checklist that can be used to launch or reenergize a volunteer program:

- Obtain the support of agency leadership:
 - Outline how volunteers fit into your agency's mission.
 - Request a letter of support for the volunteer program from management.
- Clearly define the role of volunteers:
 - Check with staff and brainstorm a list of projects that volunteers could work on. Include long- and short-term projects.
 - Ask clients how volunteers could help them.
 - Create volunteer assignment descriptions and calculate how many volunteers you will need.
- Put the pieces in place:
 - Develop a volunteer manual that includes pertinent policies and procedures.
 - Research insurance plans to determine if your organization will provide coverage for your volunteers.
 - Create an easy-to-use volunteer application process.
 - Develop an orientation for your volunteers.
 - Identify who will supervise and train the volunteers.

Whether you are adding life to a new program, or reenergizing an existing program, this toolkit provides resources and ideas for making the most out of your volunteer program.

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Toolkit: Recruit

Recruiting Tips

You have your program developed and volunteer positions ready to be filled. Now what? It is time for outreach! Recruit volunteers who are enthusiastic about your mission. Be clear when sharing information about the volunteer's activities, don't misrepresent. A happy volunteer will recruit for you. Here are some resources to get you started.

Outreach

- Use online resources to post your open volunteer positions:
 - www.volunteermatch.org
 - www.idealists.org
 - www.voa.org
 - www.pointsoflight.org
- Look for volunteers within existing community groups, or develop a partnership to address a community-wide issue together. The following groups are good places to start:
 - Civic organizations and faith-based groups.
 - University students, including:
 - Fraternities/ sororities.
 - Service/ volunteer organizations.
 - Senior and community centers.
 - Friends and family.
- Exhibit at recruitment fairs.
- Contact your local media:
 - Public radio: many stations will highlight community involvement opportunities.
 - Newspapers and neighborhood association newsletters.
 - Ask if your local newspaper would print a free ad to recruit volunteers.
 - Ask neighborhood associations to run articles in their newsletters.

Toolkit: Recruit

Volunteer assignment descriptions

When recruiting, it helps to give your volunteers a clear idea of what they would be doing. When writing your assignment description, be sure to include:

- An assignment title
- Location of assignment
- Who the volunteer will report to
- Purpose
- Educational and experience requirements
- Duties
- Time requirements
- Required training

Here are a few examples of volunteer assignment descriptions to help guide you:

Friendly visitor: A friendly visitor is needed at ABC nursing home. Set your own schedule, but a minimum commitment of one hour a week is needed. Activities include talking with clients, reading aloud articles from favorite magazines, and playing games. No education or experience required. Give us a call to request a volunteer application and learn about our monthly trainings.

Beautification team: ABC state supported living center needs 10-15 volunteers to beautify outside areas. Clients enjoy being outside in the fresh air. Benches need to be cleaned, flowers planted, and hanging baskets hung. No education or experience required. Give us a call to request a volunteer application and learn about our monthly trainings.

Art class leader: Are you artistic? The senior center in ABC city needs a small group to lead an informal arts and craft class. Dates and time are flexible. Generally, the class is held every other Saturday morning. We purchase the supplies, you supply the creative talent. The class enjoys painting, making birthday cards, decorating tote bags, or any other project that sounds like fun! This is a great way to get kids involved in volunteering. No education required, but experience as an artist preferred. Give us a call to request a volunteer application and learn about our monthly volunteer trainings.

Toolkit: Retain

How to retain your volunteers

Recruiting your volunteer is the first step. Now you want to keep them engaged and coming back.

Here are some easy things you can do to retain your volunteers

- Welcome
 - Orient your new volunteer to the organization or facility *and* to the people there.
 - Ask your co-workers to greet volunteers when they see them. Just a friendly hello can go a long way to helping a new person feel welcome.
 - Check in with new volunteers often. They might feel nervous and unsure about their new tasks.
 - Thank them! A simple “thank you” after their shift is meaningful. If a volunteer feels appreciated, they are likely to come back.
 - Strive to make them feel like part of the team. Make sure they have a name tag and a place to put their personal items. Ask staff to take time to learn each volunteer’s name.
- Engage
 - During your time with a volunteer, ask how they are enjoying their activities. When someone has been performing a task for a while, change it up so they don’t get bored.
 - *Encourage new ideas!* Ask for suggestions on new activities. Their new perspective might provide ways to run things more efficiently.
 - Create a personal connection, ask the volunteer about their interests and hobbies.
- Challenge
 - Research shows that volunteers who engage in activities that challenge them are more likely to volunteer the following year.ⁱⁱ

Toolkit: Retain

Volunteer Orientation

Giving your volunteers the tools they need to succeed

Orientation is the time to give your volunteers all of the information they will need to feel like they are an important part of a team. This is your volunteers' first impression, so it's important to make it positive, informative and motivating.

Be sure to include the following:

- A positive tone and a “thank you” to the volunteer for their interest.
- A history and description of your facility or agency.
 - An example might be how your facility or agency has changed over the years, focusing on positive programming that will highlight volunteer opportunities.
- An introduction to the facility’s or agency’s structure and a brief description of staff roles.
 - Understanding the dynamics of the staff can help the volunteer feel like a part of the team.
- Any important safety information including:
 - What to do during a fire
 - What to do if a client needs help
 - Infection control
- Information about abuse and neglect and exploitation and how to report it.
- Educational information about the client population. This is your chance to talk about appropriate behavior and boundaries. Even if some of the information seems obvious, include it.
- For in-person orientations, include a tour of your facility or agency. Online orientations should be followed by an in-person tour.

Toolkit: Retain

Setting Boundaries

Underlying everything you do as a volunteer manager is the need to build relationships. You will need to support both the volunteers and the clients as they build a relationship with each other. Even if the volunteers do not directly connect to clients, it is important for them to learn about building healthy work relationships.

Why do volunteers need boundaries?

Boundaries work to protect the volunteer and the client.

Teaching your volunteers about boundaries

- The best time to start is during orientation, where you can present your expectations clearly and prevent potential problems.
- Give new volunteers a list of relationship guidelines that your organization or facility uses. Here are some examples:
 - Do not exchange personal contact information with clients.
 - Running personal errands for clients is prohibited.
 - Confidentiality is very important. Never share client's personal information with anyone.
 - Do not accept or give gifts or money.
 - If you suspect any client being abused or neglected, you are legally required to report it immediately to Adult Protective Services at **1-800-252-5400** or at <https://www.txabusehotline.org>.ⁱⁱⁱ
 - Make sure to check with the volunteer manager before taking on a new task, whether it's a staff person or a client asking for the help.
- Ask volunteers if they have other guidelines that they think are important, and ask if they have any questions or concerns.

Most importantly, encourage your volunteers to use common sense. If they feel that they must hide their actions from staff or other volunteers, then it is most likely a boundary violation.

Toolkit: Retain

Keeping your volunteers informed

Studies^{iv} have shown that key components to volunteer retention are:

- Welcoming and respecting volunteers.
- Supporting new and seasoned volunteers.
- Assigning volunteers to tasks that match their skills.
- Informing volunteers through regular communication.
- Providing opportunities to share experiences with other volunteers.

Keeping your volunteers informed is a great way to increase communication and help volunteers feel valued.

Common ways to keep your volunteers informed

- Does your agency or facility have a monthly or quarterly newsletter? If not, start one! Include a section where volunteers can submit stories about their experiences. Include upcoming activities and news about the facility.
 - Include a message or column from the leader of the facility or agency.
 - Post upcoming special events.
 - Ask a volunteer to talk with a client and share a story from their lives. Have the volunteer write the story, with the client's permission, for the newsletter.
 - Include short stories about "done in a day" volunteer groups and share the newsletter with the group.
 - Have a section where you can introduce new volunteers and make them feel welcome.
- Use social media to post upcoming events, volunteer needs and general reminders.
- Host periodic volunteer meetings, trainings and social gatherings.
 - Ask a staff member to do a short presentation. (For example, a social worker could talk about common misconceptions about people who are older.)
 - Keep these meetings brief. Make sure to begin and end on time.

Toolkit: Recognize

Rethinking Recognition

A study^v done by Volunteer Canada has shown that the majority of volunteers prefer to be recognized on an ongoing and informal basis. But including both formal and informal recognition of your volunteers will help them feel appreciated and encouraged to continue their work.

Recognition Ideas^{vi}

- Write a personal thank-you card.
- Send the volunteer a photo of them in action.
- Provide a designated place where volunteers can take a break.
- Add a “volunteer of the month” section to your newsletter.
- After a big event, ask the volunteer to come to a staff meeting to honor their work.
- Offer spontaneous and genuine praise.
- Provide ongoing training opportunities.
- Send birthday cards.
- Ask volunteers how they would like to be recognized by including a survey with your orientation materials.
- Set time aside to have regular discussions with your volunteers.
- Invite volunteers to informal group social outings.
- Recognize the length of volunteer’s service with a certificate.
- Award appreciation plaques.
- Host an appreciation luncheon or party.
- Highlight volunteer accomplishments at a board meeting.

Whatever type of recognition you select,
make it personal and sincere!

Toolkit: Relate

Relationship Building: One of the most enjoyable aspects of volunteering is forging connections that benefit everyone - the client, volunteer and staff. As with all strong relationships, it is best if they are allowed to develop naturally.

To support your volunteers in forming positive and professional bonds with your residents or clients, make sure you position them for successⁱⁱⁱ.

Encourage new volunteers to:

- 1) Allow extra time when meeting a client for the first time, so clients won't feel rushed or pressured.
- 2) Reduce disruptions by turning off cell phones.
- 3) Sit face-to-face and maintain good eye contact. This helps if the client is hearing impaired and also will increase nonverbal communication.
- 4) Allow space for silence. Don't rush to fill up any natural conversation gaps.
- 5) Pick up on clues about the client. Photographs or music can be a place to start the conversation.

All of these ideas can help your volunteers form meaningful and healthy relationships with both clients and staff.^{vii}

The most important thing for anyone to remember is to be fully engaged. Reduce distractions and focus on what the person is saying. Forming meaningful relationships can be the thing that turns a one-time volunteer into a long-time volunteer.

Toolkit: Relate

Active Listening

Whether they are between staff and volunteers, or volunteers and clients, a strong relationship can:

- Keep your volunteers coming back.
- Increase the quality of life of clients.
- Build staff support for your volunteer program.

Part of building new relationships is creating a connection. Being a good listener can help that connection form.

Here are some tips on how to be a good active listener:^{viii}

1. Positive prompts. Use simple affirmative phrases like “mmmhmm” or “oh” to show that you are listening.
2. Summarize. Give a brief summary of what the person just said to ensure that you understood completely.
3. Silence. Giving space for silence can slow down an exchange and give the person time to think.
4. Validate. The person sharing is putting trust in you by talking with you about their lives. Let them know you appreciate this.

Also noticing nonverbal cues is important.^{ix} Here are just a few of nonverbal cues to notice that can be helpful.

1. Facial expressions. You can read a lot about what a person is thinking from their facial expressions. Happiness, sadness, or boredom can come across clearly, even if the person does not say anything.
2. Eye contact. Having good eye contact help to build trust with a person, and show them that you are listening. Try to find a chair to sit in when spending time with the person.
3. Gestures. Crossed arms can give the listener the impression that you are closed off while having an open posture can project friendliness and openness.^x

Toolkit: Relate

“They have given me more than I can ever give them.” —*Judy, State Supported Living Center volunteer*

“The more volunteers we have, the more nursing homes we can reach. My heart’s desire is to have volunteers in every nursing home in America.” — *Donna, Nursing home volunteer.*

Need more information?

Call us at 800 889-8595 or email us at VolunteerDADS@dads.state.tx.us.



ⁱ This is not a comprehensive list; you are sure to have additional creative ideas about how your volunteer program is structured and implemented.

ⁱⁱ “The health benefits of volunteering, a review of recent research”

<http://www.nationalservice.gov/impact-our-nation/research-and-reports#HBR>

ⁱⁱⁱ Law requiring reporting: [Human Resources code Chapter 48 \(48.051\)](#)

^{iv} “2013 Volunteer recognition study” <http://volunteer.ca/content/2013-volunteer-recognition-study>

^v “2013 Volunteer recognition study” <http://volunteer.ca/content/2013-volunteer-recognition-study>

^{vi} “Reenergizing Volunteer Recognition”

https://charityvillage.com/Content.aspx?topic=Re_Energizing_Volunteer_Recognition&last=165

^{vii} “Active Listening” <http://www.state.gov/m/a/os/65759.htm>

^{viii} “Becoming a better listener: Active listening” <http://psychcentral.com/lib/become-a-better-listener-active-listening/0001299>

^{ix} “Types of nonverbal communication”

<http://psychology.about.com/od/nonverbalcommunication/a/nonverbaltypes.htm>

^x “Understanding body language”

http://psychology.about.com/od/nonverbalcommunication/ss/understanding-body-language_4.htm#step-heading