

# Managing and Retaining Volunteers

Ensuring Quality Service and High Retention



# Volunteer Management and Retention

**Purpose:** To learn how to manage volunteers effectively and maximize their retention over time

## Why It Matters



### A Vital Resource

For many organizations, volunteers are an essential part of their capacity and impact



### Save Resources

Keeping and maximizing current volunteers is more resource-friendly than recruiting new volunteers



### Expand Impact

Ensuring quality service and repeat, experienced volunteers can increase organizational impact

## Main Objectives

### 1 Get Them Ready

- *Description:* Develop a plan for orientation that will effectively prepare volunteers
- *Skills or Tools:* Orientation plan
- *Takeaways:* Have a short orientation plan covering issue, organization, and skills

### 2 Manage Effectively

- *Description:* The most important factor in volunteer retention is their volunteer experience
- *Skills or Tools:* Volunteer Management guide
- *Takeaways:* Ensure basic plans are in place before volunteers arrive

### 3 Appreciate and Engage

- *Description:* Based on goals, create a plan to thank and continue to engage volunteers
- *Skills or Tools:* Stewardship Event plan, Volunteer Career Ladder
- *Takeaways:* Outline a potential volunteer stewardship event, and explore increasing volunteer responsibility



# What is a Volunteer?

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**Volunteer** / vālən'tir / noun

A person who freely offers to take part in something or undertake a task



## Helper

Food pantry

Office work

Tutor

Painting



## Professional

Accounting

Legal aid

Project evaluation

Medical care



## Governance

Board of Directors

Advisory Board

Representative

Coach

# Getting Them Ready to Volunteer

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## Three Components to Successful Orientation



### Education



### Setting



### Skills

#### *Definition:*

About the issue the volunteers' work will impact; information about the larger issue

About the organization and community volunteers are working in

About the actual work volunteers will do; hard and soft skills

#### *Components:*

Stats, articles, stories; info highlight the “what” and “why” this matters

Organizational info, community profile; highlight “who” is impacted and “how” you help

Demonstrations, role play, Q&A; highlight expectations and ideal behaviors

#### *Why It Matters:*

Engages volunteer intellectually and gives them context for need

Engages volunteer directly and puts work in context of community and organization

Engages volunteer personally and gives them confidence and direction for work

# Education: Giving Background

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## Giving Volunteers Intellectual Framework to Understand Service

1

### Issue Definition

Explain what the social issue is, its history, and some reasons why it exists

2

### Scope

Describe how many people are impacted, area where the issue is common, how long has it been going on

3

### Impact

Explain the negative impact on the population, and any related costs or damages from the issue

**Goal #1:** Broader understanding of issue to increase sense of urgency, need, and value of work

**Goal #2:** Some relation to the issue, at least intellectually, after understanding challenges and complexities of larger trends and work

# Education: An Example

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## Teaching Volunteers About Summer Learning Loss

### Organization:

Summer Camps  
for Kids Inc.

### Volunteer Role:

Mentors and  
tutors for  
underprivileged  
students at camp

### Volunteers:

Local college  
students or young  
professionals

**1 Goal:** Engage volunteers to understand challenges facing students and appreciate difficulty of learning without summer enrichment options

**2 Plan:**

- Give volunteers an article about educational inequality ahead of time
- Ask volunteers to imagine and then share with another volunteer what they used to do over the summer during school
- Share stats and information about school inequality and summer learning loss
- Activity: Have volunteers try to complete a task, but make half of the volunteers wait 15 seconds each minute

# Setting: Giving Context

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## Giving Volunteers Insight into Organization and Community

1

### Organization

Tell volunteers about why the organization was founded, its history, impact, challenges, and current goals

2

### Community

Tell volunteers about history of community, demographics, opportunities, strengths, and current challenges

3

### Connection

Explain how the organization and community work together and the role of the organization

**Goal #1:** Broader understanding of community and community members who are served by organization

**Goal #2:** Contextualize work of organization (and volunteer) to how it impacts the social issue they've learned about in education

# Setting: An Example

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## Explaining the History to Understand the Present

### Organization:

DC Shelter

### Volunteer Role:

Prepare kits and meals for those experiencing homelessness

### Volunteers:

Local community members

- 1 **Goal:** Engage volunteers to appreciate why DC has a history of homelessness and poverty and how our organization is working to address that
- 2 **Plan:**
  - Refer volunteers to several articles about the history of DC
  - Ask volunteers to share one surprising fact about their hometown
  - Share info about how the organization was founded and why our work primarily focuses on stabilizing health
  - Activity: Show before and after pictures of popular areas in town from past to present and discuss the socio-economic impact of those changes



# Skills: Giving Confidence

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## Giving Volunteers Knowledge of What to Do and What to Expect

1

### Hard Skills

Explain any specific tasks that need to be completed, or actions to complete those tasks

2

### Soft Skills

Explain any interpersonal dynamics, communication skills, or other relational skills that will be needed

3

### Expectations

Set the scene for volunteers and help them envision what service will look like and any issues that may arise

**Goal #1:** Give confidence to volunteer who may be doing a completely new task for the first time

**Goal #2:** Increase the odds of a successful volunteer experience and lower the risk of negative outcomes

# Skills: An Example

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## Teaching Volunteers About Summer Learning Loss

### Organization:

Afterschool  
Tutors

### Volunteer Role:

Tutor and spend  
time with kids in  
afterschool  
program

### Volunteers:

Local young  
professionals

- 1 **Goal:** Prepare volunteers for the work they'll be doing (literacy tutoring) and set expectations for the experience
- 2 **Plan:**
  - Bring in a long-time volunteer to discuss their typical experience and lessons learned
  - Walk volunteers through a short training on any skills related to literacy tutoring
  - Ask volunteers what they're excited about and any concerns they have
  - Activity: Have volunteers role play together different scenarios that may arise during volunteering

# Creative Ways to Orient Volunteers

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## First Impression on Volunteers



### Use Volunteers

Bring in current volunteers to discuss their experience, advice, and lessons learned



### Share a Story

Don't just rely on stats and rote information, share an inspiring story to engage volunteers



### Plan an Activity

Avoid monologues and help increase comprehension by having volunteers do something



### Technology

Move parts of orientation online, give volunteers an online quiz, or make a well-produced orientation video



### Role Play

Guide volunteers through softer skills by creating scenarios for them to try out

# Pitfalls to Orientation

## Obstacles and Challenges to Volunteer Orientation

1

### Timing

*Challenge:* Finding a time that multiple volunteers can meet at once can be a challenge

*Solution:* Move orientation online or orient volunteers in smaller groups

2

### Attendance

Problem with volunteers being reliable to attend the orientation

Have regularly scheduled opportunities; also may be a sign of future habits

3

### # of Volunteers

May have too many or not enough volunteers for typical orientation plan

Have a flexible plan and use other volunteers to help if needed

4

### Interest

*Challenge:* Volunteers may just want to do the service and aren't interested in bigger picture

*Solution:* Explain why the context matters and get creative in teaching method

5

### Resources

Staff may not have time or resources to put together a comprehensive orientation program

Use volunteers if possible and focus on reusable resources and plans



# Managing a Volunteer



## Volunteer Management:

Active oversight and guidance for volunteer(s) while performing service with the organization

1

### Whole Experience

- Managing experience from welcome to goodbye
- Think of the various stages of the volunteer experience

2

### Oversight

- Relates to the actual volunteer work
- Giving feedback for risk management, optimal performance, and safety

3

### Curation

- Relates to the experience the volunteer is having
- Giving feedback or having conversations related to why work matters, how they're feeling, etc.



Tip: The #1 factor in a volunteer returning is how they feel about their actual volunteer experience

# First Impression: Welcome the Volunteer

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## Make the Check In Process Simple and Engaging



### When is it?

- Includes volunteer travel to site, initial moments of arrival, and any prep/orientation before service



### Goals:

- Seamless experience for the volunteer
- Welcoming environment with clear instructions
- Set expectations and cultural norms right away
- Get volunteer excited for service



### Helpful Tips:

- Give clear directions and parking or public transport options to site
- Have a secure space for volunteer possessions
- Have a plan for who greets the volunteer and how they access the building

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### Questions to Consider:

1

What is likely to be frustrating or confusing for a volunteer upon arrival?

2

What do I want the volunteer to feel within 5 minutes of arrival?

3

What are the main steps of my welcome process?

# Active Management: During Service

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## Consider the Process and Interactions During Service



### When is it?

- This includes all of the time during active service for the volunteer in one session



### Goals:

- Clear expectations and guidelines
- Quality service and outcomes through feedback and praise
- Positive experience for volunteer



### Helpful Tips:

- Make sure any relevant staff are aware volunteer is coming
- Map out process for their service and identify any gaps
- Ask for feedback from volunteer during service

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### Questions to Consider:

1

What will my interaction be with the volunteer during service? Other staff?

2

Are there any parts of service that might be difficult or confusing?

3

How is the volunteer getting feedback, appreciation, and advice during service?

# Involving Other Staff

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## Ensuring a Welcoming Environment

1

### Their Role:

Explain to any involved staff their role with the volunteer, answer any questions, and set expectations

2

### Get Buy-In:

Have a plan to explain the benefit of the volunteer and how they can help, time saved, etc. to ensure buy-in

3

### Make Aware:

Even if not involved with volunteer, tell them a volunteer is coming; even better if you send a picture if a solo volunteer

4

### Thank Them:

This seems counter-intuitive, but thank other staff afterward for making the volunteer's experience positive



# Create Accountability

## Empowering Volunteers to Succeed

1

### Hurdles

- Organizational or cultural barriers that may limit a volunteer's impact
- Consider if other staff are involving the volunteer properly
- Does the volunteer have the tools or equipment they need to be successful?
- Have expectations been set?

2

### Knowledge

- Gaps in skill or awareness that limit a volunteer's impact
- Does the volunteer have the hard and soft skills they need to be successful?
- Have they received feedback—corrective and praise?
- Does the volunteer have someone to ask questions of?

3

### Motivation

- Lack of motivation or excitement that may limit a volunteer's impact
- Does the volunteer know why this work matters?
- Can the volunteer see their results? If not, is someone saying thank you?
- Is someone connecting the volunteer's work with mission impact?

# Building Motivation

## Inspiring Volunteers During Service

### Internal:

*Tap into personal drivers to encourage volunteers*



### 1 Communicate impact on:



Organization



Community



Individual

### External:

*Tap into outwardly drivers to encourage volunteers like transferable skills, resume building, etc.*



Rarely used;  
helpful with  
pro bono or  
governance

### 2 Give them a sense of connection with:



Volunteers



Staff



Community

### 3 Explain how their service will:



Save  
Resources



Be  
Remembered



Be Built  
Upon

# Saying Goodbye: After Service

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## Create Finality and Appreciation at End of Service



### When is it?

- This includes any time post-service
- End of service, clean-up/check-out, leaving the site



### Goals:

- Give volunteer definitive send-off for sense of finality
- Express appreciation and help volunteer realize impact
- Encourage volunteer to return/engage



### Helpful Tips:

- Tell volunteer ahead of time when end of service will be
- Have 2-3 things to share about appreciation and impact
- Schedule a thank you email and/or survey

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### Questions to Consider:

1

How will I communicate the volunteer's impact to them?

2

What are next steps to engage if volunteer asks?

3

What do I want the volunteer to feel when leaving the site?

# Management Tips

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## Helpful Hints at Making Positive Experiences



### Check-In

Plan some times to check-in with the volunteer and ask how they're doing



### Give Feedback

Give feedback, and don't be afraid to be corrective



### Make Connections

Find ways to introduce them to other volunteers, staff, or clients



### Thank You

In addition to saying it, give a card, schedule an email, or have some swag



### Next Steps

Don't force commitment, but let volunteer know next opportunities for engagement

# Volunteer Appreciation and Engagement



## Volunteer Appreciation and Engagement:

Engagement with volunteers after service to communicate appreciation and plan for next volunteer opportunities

1

### Saying Thanks

- Volunteers need to be thanked and appreciated like any other supporter
- Volunteers need to feel needed

2

### Building Connection

- Post-service communication should increase ties to organization
- Demonstrate impact to volunteer

3

### Next Steps

- Discuss opportunities for continued engagement
- Find increasing roles for the volunteer at the organization



Tip: Appreciated volunteers are more likely to return, donate, and promote the organization

# Showing Appreciation

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## Thanking Volunteers in a Meaningful Way

1

### For Their Time

Let volunteers know how grateful you are for the time they've given to the organization

2

### For Their Impact

Tell volunteers about the impact they made—and how it'll advance the organization

3

### For Them

Make your appreciation personal—let volunteers know you're grateful for them personally

**Goal #1:** Authentically communicate and role and impact of volunteers within your organization

**Goal #2:** Create excitement and loyalty by showing your enthusiasm for the volunteer's support—leading to further engagement

# Appreciation Opportunities

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## Finding Creative and Authentic Ways to Say Thanks



### One-on-One

Find a channel to thank them directly—email, phone, or social media



### Events

Plan an appreciation event for volunteers to say thanks and build connections



### Surprises

Thank them at an upcoming volunteer opportunity as a surprise



### Mission Moment

Connect them with the impact through client communication or senior staff thanking them



### Personal Touches

Find a way to make the thank you personal—like sending a birthday card

# Creating an Appreciation Plan

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## Have a Strategy for Showing Appreciation Over Time

1

### Schedule Group Events

What events can you use to show your appreciation, excite volunteers, and build personal connections? Try to plan 2–4 events a year.

2

### Plan Private Communications

When will you or the organization reach out and thank volunteers? Plan the dates relative to the volunteer service and use a CRM if needed to keep track.

3

### Define Roles

Decide who on your team will do what—or if other volunteers will be involved. This includes the planning, prep, and actual communications.

4

### Craft the Language

Create some standard appreciation messages ahead of time to save time throughout the year—include these in your plan.



# Designing an Appreciation Event

## Find a Way to Build Connections While Showing Appreciation

Event Detail	Description	Outcome or Purpose
1 <b>Mission Moment</b>	Specific opportunity to feel and see impact of work (e.g. video, client testimonial, tangible outcome)	Emotional connection to organization and volunteer service
2 <b>Networking</b>	Unstructured time for them to meet other volunteers, stakeholders, and to engage with you	Broader personal connection and see self as continuing supporter
3 <b>Thanking</b>	Take some time on group and personal levels to thank them for their service and time	Feeling of authentic appreciation and that the volunteer is needed
4 <b>“Wow” Aspect</b>	Nothing fancy, but find a way to create a sense of surprise or appreciation—make this event feel unique	Sense that organizational is special and uniquely worthy of support/relationship

# Building Engagement

## Creating Opportunities for Volunteers to Get More Involved



### More Time

- Ask volunteers to come more often, stay longer, or commit to a longer term partnership
- Great opportunity to give volunteer more opportunities to see their impact



### More Responsibility

- Find opportunities that require more trust with the volunteer over time
- Could include who they work with, the amount of supervision, that task at hand, or the risk



### More Leadership

- Use volunteers for increasingly important functions
- Can manage or recruit other volunteers, help at events, lead specific and defined projects

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### Questions to Consider:

1

How can I help a volunteer become more involved?

2

Does my volunteer have opportunities to evolve their service over time?

3

Why are new ways I can use volunteers to save me time?

# Appreciation and Engagement Benefits

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## Impact of an Engaged Volunteer Base



### More Volunteers

Excited volunteers will tell others and help with recruitment



### Better Impact

Engaged volunteers will drive better outcomes and work better



### Donations

Majority of engaged volunteers will donate if asked



### More Options

You can use volunteers you trust in new and more ways

# Pitfalls to Appreciation and Engagement

## Obstacles and Challenges to Volunteer Orientation

1

### Inauthenticity

*Challenge:* With high volume, hard to genuinely communicate appreciation

*Solution:* Take time to craft messages ahead of time so they're not rushed

2

### Time

Volunteer manager has limited capacity to manage engagement

Create an annual plan so it's about execution and not planning

3

### # of Volunteers

Large volunteer program struggles to thank each volunteer

Leverage pre-made templates and prioritize volunteers at events

4

### Options

*Challenge:* Lack of options leads to volunteer turnover and burnout

*Solution:* Find some lower and higher leverage options, including office work

5

### Tracking

Lots of information to follow if a system isn't in place

Use a CRM or volunteer management software; Excel is other options too pricey



# Takeaways

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## Three Things to Do Today (or Tomorrow)

1

### Plan Education

- Take a look at your current onboarding and training
- Consider how you're telling volunteers about the issue, setting, and needed skills



**Draft a plan for how you'll discuss the setting for volunteers**

2

### Set Management Goals

- Make a plan for managing a recurring type of volunteer
- Create a plan to tell other staff about volunteers
- Ask volunteers for feedback on management



**Set one new goal or expectation for volunteer management**

3

### Thank Your Volunteers

- Schedule your appreciation “touches” for volunteers
- Find ways to increase volunteer engagement over time



**Brainstorm three ways you can thank your volunteers in the next six months**