

TAKING A SYSTEMATIC APPROACH TO ENGAGING VOLUNTEERS

—Steve McCurley, SHIP TA Center Volunteer Management Consultant

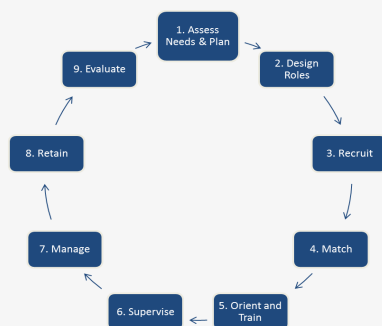
Recruiting and maintaining an effective volunteer component is harder than it used to be – volunteers have many more distractions and limits on their time and also have many more options for how to utilize that time.

The result is that to be successful in engaging volunteers, a SHIP has to pay more attention to how it is planning its approach to finding and keeping volunteers.

This is the first of what will be a succession of articles that examine best practices in involving volunteers. It will complement presentations in conferences, webinars, and written materials provided by the SHIP TA Center.

We're going to start with a basic overview of how to think about volunteer involvement from a systems viewpoint – i.e., how to make sure that you are effective in all the aspects of finding and keeping volunteers. Failing at any of the elements we're about to discuss is the equivalent of having a hole in your volunteer engagement bucket – volunteers will tend to dribble away.

A complete approach to engaging volunteers involves all the steps pictured in the diagram of the volunteer involvement cycle below:



We'll briefly describe each of the steps:

1. Assess Needs and Plan

Volunteers don't exist in a vacuum. They exist in the context of the program for which they serve and, ideally, they have a significant role to play in assisting that program. This linkage between what a volunteer does and what a program needs

means that volunteers can feel greater pride in what they do because it is really helping the program while also preventing the program from wasting resources on volunteers who aren't really helping meet SHIP program and Medicare beneficiary needs.

Smart programs focus on recruiting volunteers to do work that is most important to the program. They plan how to support the work the volunteers are doing so that they can maximize the impact of volunteer contributions. This means that a program might periodically change how it goes about involving volunteers because the needs of the program have changed.

2. Design Roles

Volunteer roles are the concrete manifestations of how volunteers will contribute to helping the program do what needs to be done. Volunteer role descriptions provide guides to the volunteers about what they will be doing, making it more likely that they will be productive and less likely that they will go astray.

The volunteer role description provides the volunteer program with a guide for supervising and managing the volunteer, since it outlines expectations.

3. Recruit

It may seem odd that recruiting is the third step in the process, but every successful volunteer program has learned that the best way to recruit effective volunteers is to have done the preliminary thinking in steps one and two – it makes it much more likely that you will get the volunteers you really need.

The only thing worse than having too few volunteers is having too many of the wrong ones.

4. Match

A truism in volunteer management is that volunteers are more likely to stay in roles that they enjoy doing and at which they are successful. The corollary of this is that not all volunteer roles are suitable for all people.

Matching is the process of finding the right role for a prospective volunteer. It is a mutual exploration between the volunteer and the SHIP program to determine whether a

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particular role engages the interest of the volunteer and also fills a need of the program. This process is often overlooked in volunteer programs and always leads to future problems.

5. Orient and Train

Of the nine steps in volunteer engagement, orientation and training is probably one most SHIP programs do best. SHIP counselors cannot perform their roles without significant training, and SHIPs have learned the consequence of having volunteers who do not understand what they are doing or how they are supposed to do it.

One of our goals in providing technical assistance is to enable SHIPs to do as well at the other steps in engaging volunteers as they do in orientation and training.

6. Supervise

Like all people, volunteers require effective supervision. Whether this supervision is provided directly by SHIP staff or indirectly through community partners, SHIP volunteers need a consistent and motivating supervisory environment. The best supervision focuses on providing a constructive and success-oriented environment for volunteers, lending the acquired knowledge of the SHIP program to the personal commitment of the volunteers and ensuring that volunteers have all the support they need.

Volunteers who do not receive supervision either quit because they don't feel a sense of connection to the program or simply go rogue and follow their own instincts in deciding what to do and how to do it, ignoring SHIP program rules and procedures. Oddly enough, the more highly motivated volunteers are, the more likely they are to go rogue if left to their own devices.

7. Manage

No volunteer is likely to be a perfect SHIP counselor when he or she first begins. Volunteers require direction and management through feedback and performance management. This process shows good volunteers how to be even better. It applies corrective performance measures to misperforming volunteers to bring their actions into sync with the rules of the SHIP program.

And since volunteers aren't necessarily angels, from time to time good management requires terminating the relationship that a volunteer has with the program.

8. Retain

Keeping good volunteers is far better than continually seeking replacements. Retention requires recognizing the achievements of volunteers through the small congratulatory actions of supervisors as well as larger acts of recognition by the SHIP program for outstanding achievement.

Most of all, retention requires doing a good job of volunteer management, since volunteers who are helped to be successful and productive are highly likely to continue volunteering.

9. Evaluate

Finally, successful volunteer engagement requires constant examination of how well the SHIP is doing with volunteers, constant improvement, and constant upgrading of the SHIP's volunteer engagement efforts.

Volunteer programs that are following the same procedures they used 10 years ago are increasingly out of step with the needs and interests of today's potential volunteers.

We'll be examining all of these stages in articles to come, but if you want a quick overview, read the *SHIP Volunteer Program Management Manual* for a deeper examination of all the areas above.

The *SHIP Volunteer Program Management Manual* is available in hard copy from the SHIP TA Center. To request a copy, call 877-839-2675 or email info@shiptacenter.org. SHIP staff can also download an electronic copy after logging in at www.shiptacenter.org. Conduct a keyword search to easily locate the manual or visit the website's *SHIP Operations* menu.