Volunteer Management Tip Sheet #2

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For long term results, use a four step volunteer intake process. Each step is described in this tip sheet:

The Volunteer Request Process

The Volunteer Intake Process

Making the Match

Following Up

See reverse side sidebar for links to additional "Toolkit" resources.

Intake Techniques for Long Term Volunteer Engagement

This tip sheet is geared to organizations with centralized volunteer intake. The volunteer is then referred to the site, department or supervisor that is appropriate for their role.

Volunteer retention builds program quality, reliability and productivity. An intake process that leads to long-term volunteer engagement involves personal interaction with both the volunteer and the supervisor. Mutual honesty in describing expectations, needs and potential concerns is key to success. Although we are delighted when a match is achieved, the occasional "miss" provides critical information to enhance future success.

The Volunteer Request Process

(*With the program, site or department seeking to use the volunteer)*

1. Meet directly with the staff who will supervise the volunteers whenever possible.
2. Encourage staff to discuss previous experience with volunteers. What was successful? What was lacking?
3. Ask staff about their supervision style (with staff or volunteers). Have they supervised volunteers before?
4. Gain a clear understanding of the need that the program, site , department or organization needs to meet. Ask to see the position descriptions that outline tasks, qualifications, schedule, training required, benefits and supervisor. Come prepared with samples or templates if the position description needs work or has not been developed.
5. Cover details such as location, parking, and perks such as lunch, discounts, training. Use the meeting as an opportunity to help staff clarify and refine their volunteer needs, especially if they have not used volunteers very often.
6. Determine staff members' flexibility. Can they work with varied schedules or skill sets? Is there room to increase volunteer responsibility over time? Are they realistic about supervision?

The Volunteer Intake Process

(With the person seeking to volunteer)

1. Set aside time to meet with the volunteer in person (preferred) or by phone.
2. Discover what the person hopes to gain through volunteering.
3. Understand the volunteer's ability (including skills relevant to the position), experience, and flexibility (amount of time, days/months/seasons, and times of day).
4. Learn about the volunteer's interests. Do they want to serve in a field where they have experience or try something new?
5. Explore the volunteer's expectations for a volunteer position and what's important to them (e.g.: opportunities to grow in the role; respect for their professional expertise; camaraderie; flexibility; building their resume, etc.).
6. Ask about what worked well and what didn't in previous volunteer experience. Ask what supervision style they prefer.

Over for "Making the Match" and "Following Up"

Content for this tip sheet was developed by Pat Sicard and Lindsay Bennett-Jacobs, of RSVP of Hampshire and Franklin Counties, with editing assistance from Massachusetts Service Alliance. This project is funded through a Corporation for National and Community Service (CNCS) Volunteer Generation Fund grant. Created 6/25/13 for massvolunteers.org.

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Click the logo or URL above for more resources in our "Intake Techniques" toolkit , or use the following links:

Guide to Intake / Informational Meetings with Volunteers

Guide to Informational Meetings with Sites, Departments or Supervisors Requesting Volunteer Assistance

Volunteer Intake Form (Sample)

Request for Volunteer Assistance Form (Sample)

Follow-up Email Template

Making the Match

1. Based on the interview, offer the volunteer two or three different options for volunteer positions. Explain details of each, and site, department, or supervisor expectations.
2. Inform the volunteer that they may interview for more than one position. Knowing they have options will increase their willingness to say honestly whether it was a good fit.
3. Contact the site, department or supervisor to let them know of the volunteer's interest. Accurately describe what you know about the volunteer's interests, availability, qualifications for the role, and level of commitment.
4. Match the volunteer and organization on as many points as possible, and inform both of any gaps regarding expected schedule, skills required, prior experience, desired level of independence, or limits on availability (e.g. school exam period, travel or vacations).
5. Set up an interview between the volunteer and the site, department or supervisor within two weeks. (See Step 6 for an alternative process).
6. If the supervisor will schedule the interview directly, encourage them to make initial contact within three days, then hold the interview within two weeks.

Following Up

(With both parties)

1. Contact the volunteer and the organization after the interview. Was it a "fit" or a "miss"? For a fit, clarify any questions the volunteer may have so s/he feels informed and confident beginning in the role. For a miss, see if small details or misinformation can be corrected. It may then become a fit.
2. If at first you don't succeed try, try again. Help the volunteer find a better-fit opportunity, and seek a better-fit volunteer for the site/department/supervisor's needs.
3. Always present a "miss" as informative and no-fault. Understanding the reasons it did not work provides critical information for designing another opportunity with the volunteer, and helps intake staff refine parameters for volunteer requests.
4. Check in after two weeks and one month. It can be hard to find time for this, so you may want to use or adapt this standard **follow-up email template**. Block out a specific time on your calendar (e.g. an hour twice a week) for follow-ups.
5. In the follow-up ask, "How do the volunteer and the organization feel about the process and the placement's success?" Offer to facilitate adjustment, if needed.
6. Follow up periodically even if the match is working well. Feedback about why a match was successful can help with future recruitment and placement.

If at any point the match is no longer a good fit, repeat the process with both parties!

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