



Boomers & Babies Project The Oregon Community Foundation

Volunteer Management Audit Best Practices & Lessons Learned May 2013

Between 2010 and 2013, 34 early childhood organizations across Oregon participated in the Oregon Community Foundation's (OCF) *Boomers & Babies* Learning Community. The goal of this Learning Community (LC) was to prepare and support these partners to effectively engage older adult volunteers in service to at-risk young children. As a part of their Learning Community experience, each organization completed the Volunteer Management Audit (VMA), participated in two convenings and received ongoing consultation. Each participating organization received a \$5000 planning grant from OCF to support their audit work. Six of the organizations continued with two-year implementation grants. As continuing LC partners, they contributed to the training and mentoring of new partners.

What is the Volunteer Management Audit?

The first step for LC partners was to investigate their organization's level of readiness to form or enhance a successful volunteer program. Such an assessment includes a commitment and involvement of staff from various levels of the organization to examine the strengths and weaknesses of the current volunteer management system as well as to plan strategic goals for improving it. If the organization currently had little or no volunteer infrastructure in place, then this audit process helped them to learn about the necessary components of a volunteer program and to plan the formation of a program that aligns with the level of need, capacity and resources within the organization. If the organization already had a volunteer program, then the audit helped to refine and build upon current volunteer management practices.

The assessment and planning tool used by the Boomers & Babies LC partners was the *Volunteer Management Audit* created by Susan Ellis at *Energize, Inc.*

This audit, while requiring an investment of time, is a powerful tool that when successfully completed informs the Audit Team about:

- What contributes to a successful volunteer program (Education)
- The status of the present volunteer effort (Evaluation)
- The possibilities for the future (Vision)
- The next Steps to take to move forward (Plan)
- What support is needed from which parts of the agency (Resources)

It is important to note that the VMA does not specifically address the organization's readiness to engage older adult volunteers. Therefore, OCF added additional assessment and analysis questions to assist in targeting the audit and planning for the engagement of Boomer-age volunteers.

The Volunteer Management Audit has three primary stages of activity:

1. **Assessing** the current volunteer program (Phases 1 – 3 of VMA)
2. **Analyzing** the assessment data for strengths, weaknesses and priorities for improvement (Phase 4 of VMA)
3. **Planning** a strategy for program improvement based on the organization's priorities and capacity to develop and sustain the program (Phase 5 of VMA)

Best Practices and Lessons Learned when Using the Volunteer Management Audit

Structural Support for the VMA Process

- **Organizational Point Person:** Ideally, there should be one designated staff person who leads the VMA process and monitors the implementation of the plan. This point-person selects, convenes and facilitates the audit team and keeps the action plan implementation on course and integrated with other organizational and budget planning. Preferably, this point-person would be the Volunteer Coordinator.
- **Learning Community:** The LC partners indicated that the additional support of convenings and consultation with core staff and peers helped them to better understand the steps required of the audit and to form more realistic and relevant action plans, without which their goals would likely have been less attainable in the short run and less sustainable in the long term. In addition to attending convenings, LC partners were encouraged to confer with one another by phone, visit one another's agencies, share resources and share the facilitation of conference calls.
- **LC Convenings:** There were two convenings scheduled during the VMA process, one after the completion of phases 1-3 and the second after the completion of phase 5. Each convening allowed for peer consultation, report outs on their progress and skill building on volunteer management, with an emphasis on engaging Boomer age volunteers.
- **Professional Consultation:** To most effectively benefit from the VMA process, professional consultation throughout the process is recommended. Phone check-ins were scheduled during the first round of work (phases 1-3), during phase 4 (analysis) and phase 5 (Action Plan). Additional consultation was scheduled as needed. The check-ins addressed questions regarding the VMA process as well as questions regarding their data and planning.
- **Resource Website:** During our second round of guiding early childhood organizations through the VMA, we were able to develop a resource website that features procedures and documents that were created by the initial LC partners. The website featured content relevant to the 12 Elements that are evaluated and addressed by the VMA. This information can now be accessed by other early childhood organizations that are developing or improving volunteer programs.

Helpful Lessons Learned

- **Tips on Completing the VMA**
 - Prior to beginning the audit, each LC partner received a hard copy of the VMA and participated in a phone orientation that provided an overview of the audit process and specific instructions on Phases 1-3. They were also provided with a time schedule indicating when each phase of work was to be completed and timeframes for phone check-ins and dates of convenings.

- There are two versions of the audit score sheet, a short version and a long version. The long version is more instructive about what it takes to successfully engage volunteers. The educational benefits of this longer version are worth the added effort.
 - When purchased, the VMA comes only as a hard-copy version. We suggest scanning the materials review form (phase 2), audit scoresheet (phase 3), analysis report template (phase 4) and Action Plan grid (phase 5). This will allow them to complete the work online and easily email it for review.
 - We required that Phases 1-3 be completed before the first convening. An overview of these first three phases was provided in the orientation conference call. During the convening, they were able to confer with one another about their audits and discuss the implications. We also provided them with instructions for phases 4 & 5.
 - The instructions for the Phase 4 Analysis were provided at the first convening. The Phase 4 requirements as presented in the VMA were confusing and redundant. The information asked for via the “Critical Questions” was redundant to the information asked for in the Analysis Report. In hind site, we recommend rewriting the Analysis Report structure to include the critical questions.
 - If the organization has goals to engage particular “types” of volunteers based on age, gender or racial and ethnic identity, then additional assessment questions targeted to these demographic groups should be added to the “Critical Questions” list in the phase 4 analysis section of the VMA. This will help the audit team to target their assessment and readiness to address these goals. We added questions that asked the LC partners to address their level of readiness and goals for engaging Boomer age volunteers.
 - It is critical to coach LC partners to keep the Action Plan (phase 5) goals realistically aligned with the organization’s resources, capacity, needs and budget. There is a compelling tendency to create goals that cannot be realistically resourced nor completed within their specified timelines. If the Action Plan goals are too aspirational and not realistically based on the organization’s resources and capacity, then the goals risk not being effectively implemented.
- **Long-range Planning:** All of our LC partners who had a two-year funded B&B project, found it a helpful practice to regularly refer back to their VMA action plan in order to monitor progress, course correct and integrate the plan with other organizational efforts. Without exception, all of these partners found the VMA to be a useful and effective long-range planning tool. The VMA becomes an ongoing strategic planning tool for the volunteer program that can be integrated with the organization’s priority setting and budget planning. This also has the beneficial effect of giving the volunteer coordinator a strategic voice within the organization.
 - **Course Correcting:** Some of the partners did veer away from their initial Action Plan strategies. As they implemented their plans, they discovered new priorities and needs that had to be addressed. During the implementation phase of the work, the LC partners often realized that it takes much longer to actualize the goals than they had anticipated. The partners need to be cautioned to create realistic time frames for their goals upfront. And they were encouraged to treat the Action Plan as a “living” document that must be updated and altered to reflect the actual work and priorities on the ground. When used this way it becomes a tracking tool for the process and stays relevant for long-range planning.
 - **Starting from Scratch:** Even if an organization had a very small or non-existent volunteer program, going through the assessment (phases 1-3) helped the audit team to learn about what components are necessary for a volunteer program to be effective and sustainable. The team was then prepared to write a targeted action plan for developing their volunteer program.
 - **Involving Staff:** It is very important that the audit team be comprised of staff from various levels of the organization as well as at least one Board member and perhaps other volunteers. This serves as an opportunity to educate staff about what it takes to have a successful volunteer program and empowers the volunteer coordinator as a leader in this effort.
 - **Peer Learning:** By requiring participating organizations to complete the VMA in the context of a Learning Community, they were able to share resources, challenges and successes that supported

their learning and progress. Eventually, we were able to build a resource website to house the policies, procedures, articles and forms that they generated in their volunteer programs.

- **Leadership Development:** As the LC partners grew in their understanding of what it takes to have an effective volunteer program; they deepened their expertise by taking on leadership roles within the LC. They took on responsibilities for regularly sharing their progress and best practices via email, on conference calls, at convenings and by contributing to the LC resource website. They also facilitated some of the training and mentoring for new LC partners.

Priorities that Rose to the Surface in the VMA

- **Volunteer Role Clarity a Must:** Volunteer role clarity is critical for both volunteers and staff to work together effectively. Therefore “Volunteer Work Design” was often highly prioritized as an Action Plan goal for our LC partners. We found that when staff is included in creating position descriptions and supported to effectively communicate with volunteers, they will support and “own” the volunteer program. Additionally, when staff has contributed to the creation of volunteer roles, the volunteer work is then more relevant to the needs of the staff and children.
- **Involving Staff is Critical:** Across our LC partners, the need for training staff to work with and supervise volunteers rose to the surface as a priority. If staff are resistant to working with volunteers and lack the skills to effectively do so, then it will be more challenging to place the volunteers and to sustain their participation. However, a shortage of staff time was a primary barrier to accomplishing the Action Plan goals. In small nonprofits, staff is often overworked with multiple roles and therefore managing volunteers often gets short shrift.
- **Community Collaboration as a Resource:** Some of the LC partners found it beneficial to include in their Action Plan the collaboration with other community organizations to advance their recruitment and placement of volunteers.
- **Prepare Before Recruiting:** Early in our LC discussions, the partners expressed a strong need for support in recruiting Boomer age volunteers. However, as they progressed through the audit, they realized that their initial priorities needed to be in developing their volunteer program infrastructure rather than developing a volunteer recruitment plan. In other words, it is counter-productive to get volunteers in the door if you are not ready to facilitate their volunteer experience in a competent and meaningful way.