

Volunteer Engagement

TOOLKIT

2014

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Volunteer Engagement is an approach that builds organizational capacity through employee and volunteer collaboration. By developing of high-impact, meaningful volunteer opportunities, you create greater influence and outcomes for your organization.

CONTENTS

1. Steps to Reactive Volunteer Engagement	1
2. Window of Work for Engaging Knowledge Philanthropists	4
TEMPLATE: Window of Work	5
How to Use the Window of Work	6
3. Salaried Employee & Board Handbook for Working with Knowledge Philanthropists	7
Policies & Processes for Engaging Knowledge Philanthropists	8
Measuring Success	12
4. Knowledge Philanthropist Recruitment: Building a Clear and Engaging Volunteer Position Description	13
TEMPLATE: Volunteer Position Description	14
EXAMPLE: Evaluation Evangelist Position Description	16
5. Knowledge Philanthropist Onboarding: Volunteer Letter of Agreement	18
TEMPLATE: Volunteer Letter of Agreement	19
EXAMPLE: Volunteer Letter of Agreement	22

1. Steps to Reactive Volunteer Engagement

Imagine someone walked through the doors of your organization today, unsolicited, and was interested in getting involved with your cause. Do you have a process in place to determine if and where there is a fit for their passion and skillset?

This resource outlines Vantage Point's 8-step process to reactive volunteer engagement.

Process

Volunteers walk in the door at Vantage Point, interested in being involved, and not responding to a posted position. The salaried employee will talk with prospective volunteers about their current day job, or where they have worked or volunteered in the recent past to ensure they are offering the organization a specific skill set, and a specific talent.

Vantage Point policy states the salaried employee will refer this volunteer to the ED, who will use her big picture overall view of the current and potential future of the organization to determine what might be an appropriate role for the volunteer. This role will be relevant for Vantage Point and relevant for the volunteer.

But what does that process really entail?

The following steps are the ones we have developed at Vantage Point as a process for reactive (that means they come to us, we don't seek them out) volunteer engagement:

Step 1:

Ask the volunteer about their work history and what they love to do. What kind of work experiences have they had? What excites them and what makes them want to go to work? What do they love about their job? What do they not like to do at all? (Window of Work quadrants)

Step 2:

From this information, you can determine if this person would be interested in training, or research, or marketing or systems analysis or finance, or organizational development, or curriculum development, or...whatever specific area might work for them.

Step 3:

From your ED knowledge of tasks in progress, current advisory task forces, current or imminent skill deficits on the board, potential programs and projects, and overall knowledge of your organization's programs and plans, identify multiple options from which the volunteer can choose. At VP we pose two or three options. Often, the volunteer will choose them all!

Step 4:

Refer the volunteer to the most appropriate member of the leadership team for the tasks the volunteer selects, if that is their selection, or begin to work with the ED if the volunteer's selection is a role that would work with her.

Step 5:

Provide a draft copy of terms of reference, position description, or letter of agreement –

whichever fits each volunteer role they have selected. It is effective to negotiate the terms of the role(s). This is because often the talented person knows more than the ED about how the role can be performed, how long it will take to complete the task, and what the checkpoints could be.

Step 6:

There might be times when the ED (or the leadership team member) might provide our developed project proposal form – that invites a volunteer to outline a potential project/program. Vantage Point has developed a template for this.

Step 7:

Provide the prospective volunteer with an electronic copy of the Knowledge Philanthropist Handbook, and invite questions and discuss the contents of the handbook with them.

Step 8:

Confirm the role with the volunteer and officially hire him.

2.

Window of Work

FOR ENGAGING KNOWLEDGE PHILANTHROPISTS (VOLUNTEERS)

Credit: Ivan Scheier 1926 – 2008

Knowledge philanthropists seek an engagement with your organization, because they are motivated to contribute to community. It is important at the beginning to have each knowledge philanthropist articulate what attracted them to this role in your organization. Why do they want to contribute their skills? What is in it for them? What is the “payment” they are seeking from the experience? A great engagement experience is one where the knowledge philanthropist is paid with meaning.

This resource includes a template for the Window of Work with instructions on how to use it. This simple yet powerful tool can provide salaried employees with information about each knowledge philanthropist, what motivates them and what they want to learn. From this information, salaried employees can develop a perfect role that is win-win for the knowledge philanthropist AND the organization.

TEMPLATE: Window of Work

<p>"WISE WHY'S" (What are you passionate about?)</p>	<p>"GLAD GIFTS" (What talents are you happy to give?)</p>
<p>"NO-NOS" (What task are Don't Asks?)</p>	<p>"QUESTS" (What do you Yearn to Learn?)</p>

How to Use The Window of Work

The Window of Work was developed by Ivan Scheier, a leading expert and pioneer in volunteer management. It was published in his book *Building Staff/Volunteer Relations*.

Salaried employees can use this tool when interviewing potential knowledge philanthropists to determine whether the person is a good fit with the role the organization has for them. The challenge for salaried employees is to take the knowledge philanthropist's talents, skills and assets and transfer those to something that works for the knowledge philanthropist, AND works for the organization.

The Window of Work is divided into four areas: Wise Why's, Glad Gifts, No-No's, and Yearn-to-Learn.

Wise Why's is about passion – the reasons they are personally passionate about the organization's mission/cause. What is it that draws them to this organization and what it does?

Glad Gifts are skills the person gives happily to the organization. In this area, the core question really is what is their favourite part of the work they do? That is usually where there is excellence. What does the person like to do best at work? The person might be a bookkeeper, and that may not be a skill they give happily. In order for there to be excellence, the people are doing something they love to do! Ask them what that is, and make the transfer of that glad gift to a role in the organization.

No-No's are the tasks and areas where they truly do not want to work. The task will not be done with excellence if the people do not enjoy it. For example, it is logical to avoid having the person who is editing the newsletter actually hate the detail of word-by-word examination of writing. Instead, that person would work where they excel, and do what they love to do: creative writing. To achieve excellence, it is important to know what they do not like to do – even if they are quite capable of doing it.

Yearn-to-Learn is largely about motivation. The people who come to your organization have a desire to learn. This is a major component for attracting and retaining talent. Organizations are rightfully wary of the people who have all the answers. The organization will want to ensure the person is curious and does want to learn.

3.

Salaried Employee & Board Handbook

FOR WORKING WITH KNOWLEDGE
PHILANTHROPISTS (VOLUNTEERS)

POLICIES & PROCESSES

This handbook includes policies and procedures for salaried employees and board members to engage knowledge philanthropists. Clear policies and procedures for salaried employees and board members to follow create a consistent experience for knowledge philanthropists and set well-defined parameters.

This version of Vantage Point’s handbook can easily be adapted to fit your organization. It was developed to be used alongside the Handbook for Knowledge Philanthropists (Volunteers) also available on the Vantage Point website.

1. Policies & Processes for Engaging Knowledge Philanthropists

1.1 RECRUITMENT PROCESS

Fielding interest from a prospective Knowledge Philanthropist (KP) – The Reactive Process:

- Determine possible fit for Vantage Point. Is the individual interested in working with Vantage Point, or is their interest general (i.e. any not-for-profit)?
- Questions for inquiry, to be handled by any appropriate salaried employee:
 - Are you interested in giving your talent and time to Vantage Point, or is your interest more general?
 - Do you have a specific interest?
 - What are your skills?
- If their interest is general, refer them to www.govolunteer.ca.
- If their interest is with Vantage Point, identify expertise areas appropriate to KP roles (financial, legal, strategic thinking, communications, people processes, organizational development, project management, etc.).
- If the individual has specific skills and an interest in Vantage Point, connect them with the Executive Director at Vantage Point.
- If the individual cannot identify specific skills, refer them to www.govolunteer.ca.
- The Executive Director is the contact for any KPs in strategic pro bono positions with Vantage Point and will lead the engagement process from this point. Refer to Steps to Reactive Talent Engagement and the Window of Work document for more details.

1.2 GENERAL INFORMATION

The following policies and processes are for salaried employees and board. They are

to be read, understood and practiced in conjunction with the policies and processes outlined in the KP Handbook.

1.2.1 Community Service Providers

Vantage Point may (although rarely) accept individuals participating in student community service activities, alternative sentencing programs, and other community service initiatives. In each of these cases, a special agreement must be in effect with the organization, school, or program from which the person originates that identifies responsibility for accountability within Vantage Point.

1.2.2 Record Keeping

The responsible employee will track KP engagement and contact information for every individual via the organization’s database. Employee record keeping will also include a “people” file that contains the resume, any records of training, recognition, evaluation, critical incidents, corrective action, and position description(s). The record will be kept for a minimum of two years following the end of the agreed service. All forms and materials relevant to the Vantage Point KP Program are located in the company folder:

File Name	File location*
Proactive Engagement Process Overview: A Process for Engaging Knowledge Philanthropists	
Reactive Engagement Process Overview: Steps to Reactive KP Engagement	
Employee Handbook	
Terms of Reference Template	
KP Handbook	
Interview Template	
Letter of Agreement Template	
Position Description Template	
Reference Letter Template	
Tracker	
Vantage Point Privacy Policy	

* Many of these files are provided as templates on the Vantage Point Website: www.thevantagepoint.ca/content/resource-centre

1.3 RECRUITMENT & SELECTION

1.3.1 Eligibility

Anyone under the age of majority is encouraged to discuss their involvement with their parents and/or guardians.

1.3.2 Position Design

Vantage Point salaried employees are responsible for designing a recruitment plan for all positions. All position descriptions will be posted on www.govolunteer.ca for record-keeping purposes and for proactive KP recruitment. Employees may (and can) recruit via other vehicles in addition to www.govolunteer.ca. Many positions will require that you target a specific skill area, and post the position where that talent will find the role.

1.3.3 Interviewing

Prior to being accepted for a KP role, all new talent will be interviewed to ascertain their suitability for and interest in a specific position. A well-conducted interview ensures Vantage Point can determine if an applicant has the necessary skills, experience, values and motivation. As well, an interview serves as an overall indicator to gauge if the recruitment program is attracting the right people. In addition to avoiding inappropriate placements, interviewing KPs plays a key role in the screening process for risk management.

1.3.4 Non-Discriminatory Interviewing

Vantage Point is committed to an equitable selection process. The interviewer will be mindful of human rights legislation as it applies to the hiring, firing, and working conditions of salaried employees and volunteers.

Vantage Point does not condone or practice KP selection in a way that screens out people of colour or individuals of a particular origin, sex, age, ability, sexual orientation or religion.

1.3.5 Checking References

Reference checks can be performed if required, only for information relevant to the position.

1.3.6 Acceptance

Service at Vantage Point begins when the Letter of Agreement is completed, and/or any applicable documents. A final decision about acceptance of a knowledge philanthropist is made by the person responsible for the particular position. In the case of a long term role (very rare), Vantage Point may evaluate the KP at three months prior to enlisting ongoing service.

1.4 SUPERVISION & RECOGNITION

1.4.1 Internal Communication

Individuals responsible for KPs are accountable to maintain regular communication with their people. Salaried employees and knowledge philanthropists are responsible for the timely completion of all necessary paperwork. The Executive Director shall be informed of any substantial change in the work or status of a KP and will be consulted before any corrective action is taken.

1.4.2 Corrective Action

Corrective action will be taken as necessary, in consultation with the knowledge philanthropist, the employee responsible and the Executive Director. Corrective action will include providing additional information, re-assignment to a new position, suspension or dismissal from service with Vantage Point. Any corrective action taken will be recorded in the file. Any serious corrective action will be taken only in consultation with the Executive Director. Vantage Point is committed to all people being focused on excellence. Everyone is accountable for their work.

1.4.3 Reporting Incidents

To minimize risk to KPs, clients, and Vantage Point, and to ensure action is taken to prevent recurrences, all accidents, hazards, and significant conflict must be reported immediately to the employee or the KP. Incidents may include threatening behaviour, injuries, violence, theft, and/or any behaviour or occurrence contributing to an unsafe or unwelcoming work environment.

1.4.4 Recognition

Supervisors are responsible for providing consistent recognition and feedback for their KPs. The appreciation must be timely and relevant. Supervisors are encouraged to implement recognition in very personal and unique ways! This will always include verbal appreciation for specific contributions and accomplishments. We also strongly encourage providing learning and development opportunities, as well as a venue to meet new people.

2. Measuring Success

The following criteria will be used to measure KP success. Employees are responsible for tracking appropriate information in the documents developed for our people. Measurement criteria will be solicited from salaried employees on a monthly basis.

2.1 KP DETAILS

- Names of knowledge philanthropists and their resume
- Provide each new KP with the Handbook

2.2 KP information

- Name
- Project or program or role
- Employees who work with them
- Interview date
- Start and finish dates

2.3 Questions for Vantage Point Leadership Team Annual Review

All members of the Leadership Team are required to engage knowledge philanthropists as part of their role. There is an expectation of achieving high quality and excellence in all our work and that requires our recruiting many different subject matter experts.

- Were you provided with the support and resources to involve KPs?
- Do you feel as though you engaged KPs in a way that was meaningful to them?
- Do you feel as though the KPs you involved delivered our mission?
- Did you find innovative ways to engage new people?
- Did you find innovative ways to recognize 'your' KP's?

4.

Knowledge Philanthropist Recruitment

BUILDING A CLEAR AND ENGAGING VOLUNTEER POSITION DESCRIPTION

Before you begin any volunteer recruitment process, the first step is a clear description of the skills, experience and expected deliverables you require for each role. Position descriptions improve your chances that the right volunteer with the right skills will apply. They also set clarity around required deliverables, improving successful execution by the volunteer.

In this toolkit you'll find a Volunteer Position Description template as well as two samples of Vantage Point Position Descriptions we've recently created for actual roles on our external talent team.

Template: Volunteer Position Description

[YOUR LOGO]

[POSITION TITLE]

Volunteer Position Description

[DATE]

Link to the Mission:

State the mission of your organization and how this person will contribute to it. Even if your mission is disconnected from the position (i.e. no direct client interaction), all volunteers are connected to the efficiency and thus effectiveness of your organization. Make it clear why this role is important to the greater cause.

Qualifications:

List:

- Experience level
- Specific skill sets, and direct experience
- Personal qualities
- Preferred talents you require for this position
- Include: An interest and commitment to the not-for-profit sector

Time Commitment:

Clearly outline how many hours over what time period you would like the role to last. Be as specific as possible about when and where the hours are to be executed. If you are flexible, highlight your ideal scenario and mention that you have flexibility. Indicate if some of the work can be done from home.

Deliverables:

- Be very specific about the tangible outputs you expect and list them individually.
- Think about this as project planning – outline the steps required for the volunteer to successfully complete the project/role.
- The more specific you are the better chance the right person will apply.
- Specifics give volunteers clarity, just as a clear job description gives your staff clarity to successfully execute their role.

Accountability:

Make sure staff and the volunteer know who the responsible staff person is. Clear lines of communication and accountability are as important with external talent as with salaried em-

employees. This also provides a context for handling potential conflicts.

Benefits and Recognition:

- List what the volunteer will gain – i.e. knowledge of subject area, contact with new people, learning about the voluntary sector, specific development opportunities they will have in this role.
- You might not be paying volunteers with money, BUT you can pay people in other ways. A letter of recommendation, a reference on LinkedIn, opportunities to learn, credit on final materials, and invitations to networking events are good examples of worthy recognition.
- It's also important to identify and focus on each volunteer's unique motivation. You may want to include: At the outset, we will discuss your learning objectives, and keep those in mind throughout your engagement.
- Another example of personal benefits to include: In this position you will have an opportunity to invest in your community, contribute your skills, learn about the NFP sector and meet new people.

How to Apply/Contact:

- Include: If interested, please send your resume (allows you to assess skills), and a brief letter outlining your interest (allows you to assess motivations) to: name, position, email, phone.
- For certain roles you may also want to ask for examples of previous work i.e. graphic design portfolio, website design examples, writing samples, etc.

EXAMPLE: Volunteer Position Description

Evaluation Evangelist Volunteer Position Description July 2012

Link to the Mission:

Vantage Point inspires and builds leadership in the voluntary sector. We do this through a variety of programs and services that educate and allow not-for-profit organizations to improve the ways in which they engage people. In order to ensure Vantage Point is successfully serving its client base, we are embarking on a process to ensure a coordinated evaluation process is in place for each of our programs and for the organization overall. The Evaluation Evangelist will play a lead role in this initiative.

Qualifications:

- Evaluation expertise
- Knowledge of organizational wide evaluation models and/or approaches
- Strong analytical skills
- Experience in the voluntary sector, preferred
- Excellent written and verbal communications skills.
- An interest in and commitment to the not-for-profit sector

Time Commitment:

Approximately 25 hours over 3 months. Most of the work can be done remotely, from home. In person/phone meetings will be required from time to time.

Deliverables:

- Conduct an audit of all current evaluation processes/activities
- Develop common metrics, indicators and data collection methods
- Evaluate and recommend approaches to ensuring a coordinated approach to program evaluation, which feeds in appropriately to organization-wide evaluation

Accountability:

The Evaluation Evangelist will be accountable to the Associate Executive Director, [Name].

Benefits:

- At the outset, we will discuss your learning objectives, and keep those in mind through-

- out your engagement.
- Your contributions will also impact the learning and development of leaders across the not-for-profit sector.

Recognition:

VP will provide a letter of recommendation at the successful conclusion of the project, upon request. We are also happy to provide a reference, if appropriate. In this position you will have an opportunity to invest in your community, contribute your skills, learn about the NFP Sector and meet new people.

Contact:

If interested, please send your resume and a letter outlining your interest to [Name], Program Director at [email].

5.

Knowledge Philanthropist Onboarding

VOLUNTEER LETTER OF AGREEMENT

You've completed the recruitment process, and found the right volunteer with the right skills - now what? A letter of agreement ensures both you and the volunteer clearly understand and agree on the project's end goal, expected deliverables and time commitment. It is important any letter of agreement is reciprocal; outlining commitments and deliverables for both parties. Use of this tool will improve project execution by providing a formalized process to discuss expectations and accountability.

In this toolkit you'll find a Volunteer Letter of Agreement template as well as two samples of a Vantage Point Letters of Agreement we've recently created for actual roles on our external talent team.

TEMPLATE: Volunteer Letter of Agreement

[YOUR LOGO]

Letter of Agreement Between [Your Organization] and [Name of Volunteer, Role Title]

[Date:]

This form constitutes an agreement between [Your Organization] and [Name of Volunteer] for the services described in the included deliverables. The terms and conditions as set out herein are not subject to any other written or verbal condition, qualification or agreement.

Term:

The term of the agreement shall be from [project start date] to [project end date] for an estimated [number] hours of work, executed in person, via telephonic and electronic consultations and independently. The end date of the agreement is subject to flexibility, with two weeks' notice.

Talent Deliverables:

[Name of Volunteer] will be responsible to [Your Organization] for deliverables as outlined originally in the Position Description or Terms of Reference. These deliverables include:

- Deliverables from the original role description if you created one. You will also have other, more specific deliverables and timelines that are appropriate to add here.
- Be very specific about the tangible outputs you expect and list them individually.
- Think about this as project planning – outline the steps required for the volunteer to successfully complete the project/role.
- What other specific tasks with deadlines are there that may not be in the project plan? Program or organization documents to review for background? Meetings to attend? Reporting requirements? Specifics give volunteers clarity, just as a clear job description gives your staff clarity to successfully execute their role.

[Your Organization] Deliverables:

[Your Organization] will be responsible to [Name of Volunteer] for deliverables as outlined in the Terms of Reference and as required to enable the project's activities. Additionally, [Your Organization] will provide:

- A primary contact: [Name of Salaried Staff and Position]
- Timely response to questions and requests and access to appropriate information

- Feedback on performance and deliverables
- Awareness of [Name of Volunteer] learning objectives and efforts to meet those objectives
- [Add any other specific deliverables you have agreed to such as a training session]

Reporting:

[Name of Volunteer] is accountable to [Name of Salaried Staff and Position].

What will you receive?

By collaborating with [Your Organization] you have the:

- Opportunity to invest in your community
- Capability to contribute to building strong leaders and organizations
- Opportunity to become a Knowledge Philanthropist
- Ability to inspire and in return be inspired
- Opportunity to move organizations forward

Compensation:

Upon completion of the agreed deliverables and at your request, [Your Organization] will provide a reference or letter of recommendation based on the work completed. [Add in any further agreements you have made i.e, graphic credit, free workshop, networking opportunities, etc.]

Expenses:

[Your Organization] will pay reasonable expenses, upon submission of receipts and with the prior approval of the [Name of Salaried Staff and Position].

Liability/Insurance:

[Your Organization] will be responsible for all insurance and liability coverage required for the project.

Ownership:

The copyright of any reports/products developed for [Your Organization] relating to the deliverables during this agreement will belong to [Your Organization] exclusively.

Confidentiality:

It is expected that [Name of Volunteer] will not divulge any confidential information concerning [Your Organization] or its dealings with individuals or organizations. [Name of Volunteer] will review and abide by the Privacy Policy Statement and Confidentiality portions of the Volunteer Handbook.

Termination:

This agreement may be terminated with [days/weeks/months] written notice, by either party. In the case of early termination, [Your Organization] will provide [Name of Volunteer] with appropriate feedback on the quality of performance to that date.

This agreement carries with it no commitment respecting continuation of services beyond the specified term.

[Name of Signing Authority and Position]
[Your Organization]

Date

[Name of Volunteer]
[Name of Volunteer Role]

Date

EXAMPLE: Volunteer Letter of Agreement

Letter of Agreement Between Vantage Point and John Doe, Graphic Designer – Learning Materials

Date: October 27, 2014

This form constitutes an agreement between Vantage Point and John Doe for the services described in the included deliverables. The terms and conditions as set out herein are not subject to any other written or verbal condition, qualification or agreement.

Term:

The term of the agreement shall be from July 19, 2012 to approximately September 30, 2012 for an estimated 20 hours of work, executed in person, via telephonic and electronic consultations and independently. The end date of the contract is subject to flexibility, with two weeks' notice.

Talent Deliverables:

John Doe will be responsible to Vantage Point for deliverables as referenced in the Graphic Designer – Learning Materials Description (see position description). These deliverables include:

- PowerPoint, Workbook & Toolkit concept (as proposed by designer)
- Final template design for PowerPoint, workbooks (approx 5 pages) and the toolkits (1-2 pages) using already developed content
- Source any images required (Vantage Point will manage the rights/permissions for those images)
- Work with Vantage Point to determine the best format/software for ensuring the ability to edit the templates post-design and provide all final design files to Vantage Point

Vantage Point Deliverables:

Vantage Point will be responsible to John Doe for deliverables as required to enable the project's activities. These deliverables include:

- Ability to include final product in your portfolio of work and design credit where appropriate
- A primary contact: Anastasia Palubiski, Director of Communications and People Engagement.
- Timely response to questions and requests and access to appropriate information.
- Feedback on performance and deliverables.
- Awareness of John Doe's learning objectives and efforts to meet those objectives.

Reporting:

John Doe is accountable to Anastasia Palubiski, Director of Communications and People Engagement.

What will you receive?

By collaborating with Vantage Point you have the:

- Opportunity to learn content in governance and not-for-profit management
- Opportunity to expand your networks and connections in the community
- Opportunity to invest in your community
- Capability to contribute to building strong leaders and organizations
- Ability to inspire and be inspired

Compensation:

Upon completion of the agreed deliverables and at your request, Vantage Point will provide a reference or letter of recommendation based on the work completed.

Expenses:

Vantage Point will pay reasonable expenses, upon submission of receipts and with the prior approval of Annastasia Palubiski, Director of Communications and People Engagement.

Liability/Insurance:

Vantage Point will be responsible for all insurance and liability coverage needed for the project.

Ownership:

The copyright of any reports/products developed for Vantage Point relating to the deliverables during this agreement will belong to Vantage Point exclusively.

Confidentiality:

It is expected that John Doe will not divulge any confidential information concerning Vantage Point or its dealings with individuals or organizations. John Doe will review and abide by the Privacy Policy Statement and Confidentiality portions of the Volunteer Handbook.

Termination:

This agreement may be terminated with two (2) weeks written notice, by either party. In the case of early termination, Vantage Point will provide John Doe with appropriate feedback on the quality of performance to that date.

This agreement carries with it no commitment respecting continuation of services beyond the specified term.

Denise Baker,
Executive Director, Vantage Point

Date

John Doe,
Graphic Designer – Learning Materials

Date

Volunteer Engagement TOOLKIT

*We inspire and
build leadership
in the voluntary sector*

 **vantage point**

The talent will take you there.

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