Pillars of Efficient and Effective Volunteer Management: How to Care for Yourself and Your Volunteers

By Emmy Soyka, MNM (Hearts & Horses Therapeutic Riding Center)  
emmy@heartsandhorses.org 970-663-4200

1. Pillar 1: Prioritize What’s Important – Building Relationships  
a. What is the Value of a Good Relationship with the Volunteer Manager?  
i. Volunteer Management = Relationship Management  
ii. Key Indicator of Retention (For Volunteers and For You)  
1. Model Organizational Culture & Good Relationships Between Other Staff/Volunteers  
2. Clarify Expectations & Provide A Standard to Measure Impact  
3. Recognize/Address Potential Problems Ahead of Time  
4. Inspire Enthusiasm, Motivation, and Loyalty  
5. Build the Volunteer Team for A Stronger, More Effective Organization  
b. Key Elements of Building Volunteer Relationships  
i. Honesty: Clear Expectations, Provide Explanations, Fair Feedback, Open Discussion, Authenticity  
ii. Forward-Thinking: Communicate Goals, Set Roles, Observe Skills to Adjust Responsibilities  
iii. Competency: Delegate, Share Decision-Making, Manage Priorities, Foster Collaboration  
iv. Inspiration: Model Behaviors, Foster Independence, Celebrate Success  
c. Volunteer Life Cycle  
i. Focus on Recruitment/Placement: Starting the Relationship  
1. Get to Know Volunteers: Motivation, Commitment Level, Availability, Interests, etc.  
2. Group AND Individual: Paperwork, Orientation, Interviews, Training, etc.  
3. Walk Through Volunteer Self-Assessment of Strengths, Weaknesses and Motivations  
4. Assess Fit for Current Team Dynamics  
ii. Focus on Orientation/Training: Traits of An Effective Helper  
1. Empathy: communicate understanding of experiences/feelings  
2. Respect: deep/genuine appreciation for worth  
3. Warmth: positive gestures of concern/affection  
4. Genuineness: being freely and deeply oneself  
5. Concreteness: specificity of expression  
6. Confrontation: ability to acknowledge discrepancies  
7. Self-Disclosure: communication of self-awareness  
8. Immediacy: communicating in here and now  
9. Potency: dynamic/magnetic qualities of helper
iii. Focus on Retention/Appreciation: Building a Long-Term Relationship
   1. Build Trust/Reliability Over Time
   2. Understand Goals/Motivations
   3. Foster Continuous Open Dialogue
   4. Be Flexible and Accommodating
   5. Be Sensitive to Gender/Culture/Language/Age
   6. Observe Under Pressure
   7. Realize That Relationships Grow and Change Over Time
   8. Don’t Forget to Share Too!

2. Pillar 2: Automate What You Can – Leveraging Technology
   a. Effective Time Management Techniques: Building in High Flux
      i. Take Time Once a Week to Plan for the Next Week
      ii. Plan for a Large Percent of Your Day to Be Flexible
         1. Email/Phone Communications
         2. Finding Last Minute Volunteer Positions
         3. Putting Out Fires
         4. Building Relationships with Volunteers
      iii. Plan for a Percent of Your Day to Focus on Non-Volunteer Program Tasks
      iv. Detail Your Day for Events vs. Tasks (Be Realistic)
      v. Compartmentalize to Reduce Stress
   b. Different Task Management Methods
      i. Lots of Options-Find What Works for You and Be Consistent
      ii. How I Do It
         1. 2 Hrs: Communication/Planning
         2. 2 Hrs: Managing Schedule
         3. 1 Hr: Training or Substituting
         4. 3 Hrs: Project Time
      iii. Why I like My Method
         1. Ability to store information for future and archive
         2. Ability to move things around
         3. Ability to ignore what I can’t do anything about right now
         4. Transparency to other staff/volunteers
   c. Volunteer Life Cycle
      i. Focus on Recruitment/Placement: Tracking Volunteer Information
         1. Save A Lot of Data Entry Time with Technology
         2. Ensure Data Integrity with Fewer Players
            a. Online Forms that Feed Directly into Database
            b. Website Portals
            c. Background Check Systems
            d. Volunteer Scheduling Software
            e. Mass Communication
ii. Focus on Supervision: Volunteer Communication
   1. Categorize Communication
      a. Announcements: little response
      b. Conversations: require discussion
   2. Divide Type of Communication
      a. Announcements = Digital
      b. Conversations = Face-to-Face
   3. Choose Delivery Method: Email, Text Messages, Online Announcement Boards, Social Media, Newsletters, etc.

3. Pillar 3: Make Time to Step Back – Thinking Big Picture
   a. Planning Time for Focused Strategic Thinking
      i. Make Time Each Week or Month to Think Big Picture - Review Progress to Past Goals and Make Plans for New Goals
      ii. Building Blocks of Volunteer Engagement
         1. Lay the Foundation through Mission and Vision - Do Volunteers Fit in the Way They Want? How Can They Better Support the Mission?
         2. Combine Inspiring Leadership with Effective Management - Do You Have A Clear Focal Point? Are You Achieving Your Goals?
         3. Build Understanding and Collaboration - What and How Do You Communicate With Volunteers and Involve Them in Program Development?
   b. Volunteer Life Cycle
      i. Focus on Evaluation: Involving Volunteer Voices in Implementation
         1. Identify Volunteer Success Stories to Share With Donors/Community
         2. Discover Barriers/Challenges
         3. Obtain Fresh Ideas/Suggestions
         4. Validate Your Own Experiences
         5. Anticipate Future Needs/Concerns
         6. Get Support on Making Change
         7. Create A Team for Change Implementation
Resources To Check Out:

General Resources:

Community Tool Box (University of Kansas)
  Main Table of Contents: https://ctb.ku.edu/en/table-of-contents
  Toolkits: https://ctb.ku.edu/en/toolkits
The Essential Guide to Managing Volunteers at Your Nonprofit (VolunteerPro)
  https://volpro.net/managing-volunteers/
Energize Inc. Especially for Leaders of Volunteers
  https://www.energizeinc.com/
Volunteer Management: The Essential Guide to Engaging (and Keeping) Volunteers (Double the Donation)
Points of Light Resources (including Volunteer Management Training Series)
  https://www.pointsoflight.org/resources/

Pillar 1: Prioritize What’s Important – Building Relationships

The Day We First Met (Becky Lunders)
  https://trust.guidestar.org/blog/the-day-we-first-met
I Got Dumped: The Dark Side of Volunteer/Staff Relationships (Becky Lunders)
  https://trust.guidestar.org/blog/i-got-dumped-the-dark-side-of-volunteer/staff-relationships
  Bridging the Gap between Volunteer Programs and Today’s Volunteers (Paula Speevak-Sladowski)
  http://www.csaec.com/Portals/0/Membership/Membership%20Promotion/Membership/Bridging%20the%20Gap%20between%20Volunteer%20Programs%20and%20Today.pdf
  Traits of the Effective Counselor (Sidney Wolf)

Pillar 2: Automate What You Can – Leveraging Technology

  Salesforce for NonProfits: https://www.salesforce.org/nonprofit/
  HootBoard: https://www.hootboard.com/
  HootSuite: https://hootsuite.com/
  MailChimp: https://mailchimp.com/
  FormAssembly: https://www.formassembly.com/
  Sterling Volunteers: https://www.sterlingvolunteers.com/
  Helping Habit: https://www.helpinghabit.com/discover
  Volgistics: https://www.volgistics.com/

Pillar 3: Make Time To Step Back – Thinking Big Picture

Self Care Wheel (Olga Phoenix)
  http://www.olgaphoenix.com/key-offerings/self-care-wheel/