## Contents

### 1 Personal and Organizational Philosophy about Volunteering

- Introduction to the Executive Role .................................................. 8
- Worksheet: Personal Volunteer History .............................................. 9
- Idea Stimulator: What Are My Beliefs about Volunteering? ................ 14
- Self-inquiry: The Value of Volunteers for Our Organization ................. 15
- Key Concept: Creating a Statement of Philosophy on Volunteer Engagement .......................................................... 19
- Action Steps: Creating a Statement of Philosophy on Volunteer Engagement .......................................................... 20
- Example: Sample Statements of Philosophy from Various Organizations . 23
- Worksheet: Making the Statement of Philosophy a Living Document ....... 27
- Executive Self-Assessment: *Do I create and support a strong philosophy of volunteer engagement with these actions?* .................... 29

### 2 Planning for Volunteer Engagement

- Introduction to the Executive Role .................................................. 32
- Worksheet: Questions to Answer Before Planning (or Redesigning) Volunteer Involvement .......................................................... 33
- Checklist: Organizational Readiness to Engage Volunteers or Expand Volunteer Involvement .......................................................... 35
- Action Steps: Planning a Volunteer Involvement Strategy ....................... 36
- Action Steps: Integrating Volunteer Engagement into Organizational Strategic Planning .......................................................... 38
- Action Steps: Align/Create Volunteer Positions in Response to Strategic Organizational Goals .......................................................... 40
- Idea Stimulator: A Starting Point for Forming Policies Related to Volunteers .......................................................... 43
- Example: Volunteer Policies and Procedures ......................................... 45
Executive Self-Assessment: *Do I plan for volunteer involvement and develop appropriate policies with these actions?* 

3 **Budgeting for and Funding Volunteer Involvement**

Introduction to Executive Role. ........................................... 48

Worksheet: Budgeting for Volunteer Involvement .................. 49

Checklist: Other Resource Allocation .................................. 54

Key Concept: Challenges in Raising Funds to Support Volunteer Involvement ........................................... 55

Worksheet: Key Questions to Think through before Contacting Potential Funders ........................................... 57

Key Concept: Where to Research Potential Funding for Volunteer Involvement ........................................... 59

Key Concept: Constructing a Case Statement for Donors to Support Volunteer Engagement ........................................... 63

Worksheet: Preparing to Respond to Possible Donor Objections ........................................... 64

Key Concept: Talking Points to Gain Donor Support for Volunteer Involvement ........................................... 65

Self-Inquiry: Methods for Raising Funds for Volunteer Involvement ........................................... 68

Idea Stimulator: Three Questions about Connecting Time and Money Donors ........................................... 69

Idea Stimulator: Inviting Volunteers to Consider a First-Time Financial Contribution ........................................... 72

Action Steps: Gifts in Honor of Volunteers ........................................... 74

Executive Self-Assessment: *Do I budget and seek funding for volunteer involvement with these actions?* 

4 **Hiring and Placing Staff to Lead Volunteer Engagement**

Introduction to the Executive Role ........................................... 78

Key Concept: Why Designate or Hire a Leader of Volunteer Involvement? ........................................... 79

Key Concept: Models of Staffing Volunteer Engagement ........................................... 80
5 Creating a Management Team for Volunteer Involvement
6 Building Staff Commitment and Competency to Partner with Volunteers

Introduction to the Executive Role ........................................... 118
Self-Inquiry: Executive Perspective on Strengthening Staff Partnerships with Volunteers ........................................... 119
Survey: Assessing Staff Commitment to Partner with Volunteers .............................................................................. 120
Checklist: How Executives Ensure that All Staff Are Clear on What Is Expected from Them in Working with Volunteers .............................................................................. 123
Idea Stimulator: Staff Actions in Partnering with Volunteers ....................................................................................... 124
Example: Staff Actions in Partnering with Volunteers ............................................................................................... 125
Idea Stimulator: Building Staff Competence through Training .................................................................................... 127
Survey: Determining Staff Training Needs for Working with Volunteers ....................................................................... 129
Idea Stimulator: Ways to Show Appreciation for Staff Excellence in Partnering with Volunteers ........................................... 133
Executive Self-Assessment: Do I ensure staff commitment and competency in volunteer engagement with these actions? .............................................................................. 135

7 Integrating Volunteers throughout the Organization

Introduction to the Executive Role ........................................... 138
Key Concept: Integrating Volunteers throughout the Organization ................................................................................ 140
Idea Stimulator: Mutual Expectations between the Volunteer Involvement Staff and All Staff/Departments Partnering with Volunteers ........................................................................... 147
Collaboration Strategy: Volunteer Involvement and the Board of Directors ........................................................................ 149
Collaboration Strategy: Volunteer Involvement and Senior Executives/Administrators .......................................................... 151
Collaboration Strategy: Volunteer Involvement and Programs/Services ............................................................................... 153
Collaboration Strategy: Volunteer Involvement and Personnel, Human Resources, and Staff Education ........................................... 154
Collaboration Strategy: Volunteer Involvement and Development, Fundraising and Special Events ........................................ 156

Collaboration Strategy: Volunteer Involvement and Public Relations, Marketing, Community Outreach, Website and Social Media ............. 158

Collaboration Strategy: Volunteer Involvement and Information Technology ................................................................. 160

Collaboration Strategy: Volunteer Involvement and Advocacy, Public Education, and Government Relations ............................... 161

Collaboration Strategy: Volunteer Involvement and Finance/Accounting ................................................................. 162

Collaboration Strategy: Volunteer Involvement and Legal Compliance and Risk Management ......................................................... 163

Collaboration Strategy: Volunteer Involvement and Maintenance, Security, and Physical Plant .................................................. 164

Worksheet: A Guide to Expanding Volunteer Engagement ................................................................. 165

Checklist: Starter Set of Ideas for Volunteer Talent to Support You—the Executive! .......................................................... 168

Executive Self-Assessment: Do I integrate volunteers throughout the organization with these actions? ................................. 169

8 The Board's Role in Volunteer Engagement

Introduction to the Executive Role ................................................................. 172

Key Concept: Why Volunteer Involvement Deserves Attention from the Board of Directors .................................................. 173

Checklist: 21 Ways a Board Can Demonstrate Support for Volunteer Involvement ...................................................... 174

Idea Stimulator: Ways to Engage the Board of Directors in Volunteer Involvement ...................................................... 176

Idea Stimulator: Questions the Board Might Ask to Keep Informed about Volunteers ...................................................... 178

Executive Self-Assessment: Do I facilitate the engagement of our board of directors in volunteer involvement with these actions? .................. 180
9 Ensuring Legal Compliance and Managing Risk When Involving Volunteers

Introduction to the Executive Role .......................... 184

Checklist: Are Volunteers Included in Our Legal and Risk Planning? 185

Action Steps: Limiting Risk in Volunteer Involvement ................. 188

Example: Sample General Policy Statement on Risk Management. . 193

Key Concept: Create a Risk-Aware Corporate Culture .................. 194

Idea Stimulator: Some Questions to Ask Your Attorney or Legal Department ............................................. 195

Idea Stimulator: Stereotypes, Misinformation, and Poor Advice Sometimes Expressed by Legal Advisors…and Suggestions for Executive Response to Them ........................................... 196

Executive Self-Assessment: Do I ensure legal compliance and proper risk management of volunteer involvement with these actions? . . 198

10 Monitoring, Evaluating, and Improving Volunteer Involvement

Introduction to Executive Role. .............................. 202

Idea Stimulator: 15 Reasons to Evaluate Volunteer Involvement .... 203

Checklist: Possible Questions for Assessing Volunteer Involvement. . 204

Key Concept: Ways to Value Volunteer Contributions .................. 206

Key Concept: Four Methods of Evaluating Volunteer Involvement . 208

Executive Self-Assessment: Do I monitor and evaluate volunteer involvement with these actions? ......................... 214

Bibliography and Other Volunteerism Resources ....................... 217

About the Authors .................................................. 225