CalSERVES Volunteer Infrastructure Project (VIP)
AmeriCorps Fellow Work Plan

The Volunteer Infrastructure Project is designed to create a sustainable, effective system of volunteer engagement at our Partner Sites. The pillars that mark a robust volunteer program include:

- Fully developed volunteer roles, including leadership opportunities and roles for high-value volunteers (HVV)
- Effective marketing strategies and campaigns to recruit volunteers
- Complete training plan to give volunteers the tools they need to serve effectively
- Equitable policies that utilize management best-practices to address volunteer performance and behavior
- Organizational structure, culture, and staff buy-in to support volunteer efforts
- Detailed tracking systems that include accurate and up to date records of volunteer involvement
- Evaluation protocol to assess volunteer contributions
- Plan to recognize and retain volunteers over time
- Sustainable business partnerships that support service

Partner Sites include established nonprofit, educational, and government organizations whose volunteer systems are at varying levels of development. As an established organization, your Partner Site may have completed development of the volunteer system in one area, but hasn't even begun development in another area. Or, perhaps they've developed a few systems across many areas. You may even be working with a brand new partner site that has little to no systems developed for volunteers.

To meet the needs of your Partner Site, use the chart of the following pages. This chart aligns with the Volunteer Capacity Assessment (VCA) to show steps you should take to complete the needed areas of program development. To use the tool:

1. Assess the areas of need in the volunteer program at your organization. See the latest VCA filled out by a staff member (likely by your supervisor). Indicators marked as "not complete" are areas of need, and these are indicators you will work on. Keep note of these areas for your records.
2. Find the Indicators you've marked as areas of need in the charts on the following pages.
3. Follow the "Member Tasks" that correspond with the areas of need. Complete these tasks and others as needed to achieve the indicator/goal.

VCA Standard 1: **Strategic Plan Development**
The strategic plan will reflect volunteer utilization and address values for volunteer involvement and addresses the need for procedures for managing volunteers, based on principles of equity and diversity. This standard and the associated areas that follow are usually completed in the first year of volunteer program development.

Indicator/ Goals	Member Tasks
Position descriptions have been developed	1. Interview all staff members to identify gaps in desired outcomes and current staff ability. Identify ways in which volunteers can then have supportive roles in the organization. 2. Develop and format position descriptions for all identified roles, including position title, time commitment, and description of tasks. 3. Determine what safety measures need to be in place to implement volunteers (background checks, references, criminal history, etc.).
Marketing Strategies are Being Developed	1. Post position descriptions on volunteer recruiting websites (idealist, volunteer match, etc.) 2. Begin using social media to increase the reach of the organization into the community, and to keep interested people informed about activities. 3. Create fliers to distribute at local hot spots 4. Identify volunteer fairs, job fairs, local markets, and other places for tabling and recruiting. 5. Connect with the local volunteer center to find further opportunities for recruitment and marketing opportunities.
Potential business partnerships have been identified.	1. Identify the needs of the organization and generate list of local businesses that could support these needs. 2. Create a database to identify and track potential and actual business partnerships. The database should include former and current business partners and additional businesses that may be interested in providing donations or volunteer support. Information to track includes: a. Business name b. Contact person name and title(the person at the business who makes decisions about donations/ CSR)

Indicator/ Goals	Member Tasks
	c. Contact information like email address, phone number, address, website, etc. d. History of donations given/volunteers contributed and the Partner Site representative they worked with 3. Create a plan to approach businesses to establish an interest level in developing a volunteer effort partnership. To support these efforts, you may: a. Create proposals to request business support and offer support to the business partner. b. Compile or create informational materials about the volunteer program to inform the business community c. Contact businesses to request phone or in person meetings to discuss a potential partnership
Organization has identified roles for highly skilled volunteers	1. Identify specialized skill needs of the organization. Some examples might include website design, IT expertise, legal consultation, carpentry, or other needs that require outside experience, education, or expertise. 2. Create position descriptions for specialized roles. 3. Identify the target community that has the specialized skill set or education base. 4. Create recruitment strategies to target individuals with the skills to meet the specialized position descriptions.
Volunteer recruitment policies have been documented.	1. Create a written recruitment and screening policy. This policy should include: a. Practices to outreach to a diverse volunteer base. b. Application policies c. Interview process d. Background check policy 2. Create a database of venues/methods for recruitment. The database should include former and current venues and additional potential venues. This may include local colleges, high schools, libraries, volunteer centers, senior homes, and other community centers. Be sure to include venues that will include outreach to diverse populations. 3. Create an action plan for finding potential volunteers including methods used. The action plan should include approaching venues identified in the database.

Indicator/ Goals	Member Tasks
	4. Define staff roles in volunteer recruitment, and communicate these roles to relevant staff and their supervisors.
Volunteer tracking mechanisms are in place.	1. Create a list of potential volunteer tracking methods appropriate for the program, including approximate annual cost. 2. Meet with program management to present options and select the method that best meets the organization's needs. 3. Set up selected volunteer tracking mechanism. 4. Create training materials and resources to instruct staff and volunteers in use of the tracking system. 5. Train relevant staff and volunteers in to use of the tracking systems using created materials. 6. Develop a method of monitoring and reviewing tracking systems to ensure accuracy and accountability. 7. Create training materials for relevant staff on how to access information or generate reports from the tracking system.
Volunteer orientation trainings have been created and implemented.	1. Create a volunteer handbook for the organization, including the organization's mission, relevant, staff contact information, policies and procedures for both the organization and specifically for volunteers. 2. Create specialized orientation materials for each position description, including relevant role, supervision, and department information. 3. Develop an agenda for the orientation for volunteers, including relevant policies and expectations, organization history, and needed materials. 4. Provide relevant staff members with train-the-trainer resources. Check for staff understanding implementation procedures for volunteer orientations. 5. Develop an orientation schedule. (This can take many forms – from a regular weekly or monthly orientation time, to individualized schedules created for each volunteer.) 6. Create a policy and system to ensure that 100% of incoming volunteers participate in the orientation training.

Indicator/ Goals	Member Tasks
Volunteer interview procedures have been established.	1. Determine the expectations and qualifications required of the organization's volunteers. Document these expectations. 2. Create a screening process to determine if incoming volunteers meet the qualifications of the program and can meet the program's expectations. This process will normally include: a. A volunteer application and process for application review b. Interview system c. Background check process d. Process for accepting or declining individuals to specific volunteer roles. 3. Create volunteer application. 4. Create volunteer interview process, including standardized interview questions and a scoring system to determine volunteer's competency to serve in specific roles. Note who conducts the interviews, who follows up with the interview, and how applicants are informed of their acceptance or denial to the volunteer role.
Volunteer roles have been documented and communicated to staff.	1. Develop a comprehensive list of tasks and projects for each volunteer position. 2. Develop materials to communicate all of the organization's volunteer roles to the organization's staff. 3. Distribute materials to staff members.
Volunteer recognition plan has been developed.	1. Create a budget proposal for volunteer recognition. 2. Working with the program director, create a budget for volunteer recognition. 3. Create a volunteer recognition plan, including a calendar with regular recognition opportunities. Incorporate multiple modes of recognition into the recognition plan. Examples of different modes of appreciation include: • A mention in the organization's newsletter or social media • A handwritten card from a client • A volunteer luncheon or gala • A small gift, gift card, or voucher for a local business 4. Assign volunteer recognition activities to relevant staff members.

Indicator/ Goals	Member Tasks
Staff roles and volunteer supervision are defined.	1. Determine roles and expectations for relevant staff members around each volunteer positions. 2. Create documents outlining identified staff expectations. These documents should identify what staff member has responsibility for supervision of each volunteer role. 3. Work with the program director to update relevant staff position descriptions to include responsibilities related to the volunteer program, such as recruitment, training and supervision duties. 4. Create policies for volunteer supervision to include specific staff persons responsible for supervision of volunteers and supervisory procedures. 5. Communicate volunteer supervision policies to all staff who supervise volunteers and check for understanding. 6. Create a way for volunteers to provide feedback on supervision.
Policy addressing volunteer behavior has been created.	1. Develop a policy addressing volunteer behavior to include volunteer expectations and defined responses for unacceptable behavior. This policy should define procedures for responding to unacceptable volunteer behavior. Volunteer behavior procedures should include management best practices in positive coaching and other methods of correcting unacceptable behaviors. 2. Determine policy for disciplining a volunteer that breaks the organization's policies.

TIP: If you're having trouble determining your plan of action to meet your organization's needs, reach out for help. Ask for direction or ideas from your supervisor at the Partner Site, your supervisor at the Supervising Organization, or your local VIP Leader.

VCA Standard 2: **Strategic Plan Implementation**
In implementing the Strategic Plan, the staff is comfortable and confident at supervising and utilizing volunteers effectively. This standard and the associated areas that follow are usually completed in the second year of volunteer program development.

Indicator/Goals	Member Tasks
Marketing plan for volunteers has been created and implemented, including marketing to business partners and specific marketing for highly skilled volunteers	1. Determine what marketing policies and strategies already exist at the Partner Site. If marketing policies exist, take note and follow all marketing procedures to create volunteer marketing plan. 2. Create a marketing plan that includes recruitment venues identified in Year 1. Include diverse approaches in the marketing plan, including flyers, online or television advertisement, presentations to clubs, classes, or businesses, and other methods. The Plan should include specific strategies to target each role, including specialized materials and specific marketing venues. 3. Develop volunteer program marketing materials, including flyers, brochures, and posters/banners. 4. Have marketing materials for volunteers approved by the organization's marketing department or Director. 5. Create specialized plans with specific strategies to target business partners for volunteer support. This includes specialized materials that highlight the available options of a corporate volunteering program. 6. Create a marketing calendar that includes dates of community events, job fairs, and other potential marketing events and persons responsible for outreach around these events.
System to provide feedback and evaluation on the work of individual volunteers has been developed and implemented.	1. Develop volunteer evaluation forms to reflect the written expectations and duties of the volunteer roles. Solicit feedback from volunteers supervisors to ensure it covers relevant performance areas. 2. Create a system for volunteer evaluation, including an annual timeline for evaluation of each volunteer and the person responsible for providing the feedback. This system should include face-to-face meetings with volunteers to provide feedback 3. Train all staff members who play a role in supervising

Indicator/Goals	Member Tasks
	volunteers in the evaluation system. This should include training in evaluation and communication best practices.
Staff are trained in volunteer management best practices and understand their role in relation to volunteer management.	1. Create training materials and agendas to instruct staff members in volunteer management best practices. 2. Create a meeting or training calendar for all staff who supervisor volunteers. It is suggested that all staff involved in the volunteer program attend at least 1 training per year in volunteer management best practices. 3. Provide training and volunteer management materials to all staff working in any aspect of the volunteer program according to the established calendar. 4. Ensure that all staff understand their role in relation to other role in the volunteer program and the organization's relevant volunteer policies.
Positive employee/volunteer relationships are cultivated and problems are dealt with quickly.	1. Assess the current organizational culture around volunteers. Do staff welcome and value volunteer involvement? Do volunteers feel included and appreciated? Identify areas for improvement. 2. Create structures and policies to promote a welcoming atmosphere for volunteers. For example, staff members may be instructed to always say "hello" to volunteers in passing, some volunteers may be included in pertinent staff meetings, and volunteer roles may be added to the organizational chart. 3. Provide introduction to organizational culture and structure to incoming volunteers. This may be included in the volunteer handbook or orientation. 4. Define the volunteer program's conflict resolution procedures. The organization may have policies in place that can be used to resolve conflicts between staff and volunteers, or new guidelines may need to be created. 5. Survey volunteers and staff on their satisfaction with the volunteer program and relationships with other organizational participants. Practices and policies should be reexamined as needed in response to feedback received.

Indicator/Goals	Member Tasks
System to receive volunteer feedback has been developed and implemented.	1. Create a volunteer feedback survey. Categories may include satisfaction with the program, staff supervision, overall experience, and ideas for improving the program. 2. Create procedures around volunteer feedback, including a timeline for regular distribution and collection of the feedback survey (suggested at least one time annually) and process for review of feedback received. The evaluation process should include staff decision makers able to make appropriate changes to the program based on feedback received. 3. Distribute the volunteer feedback survey to 100% of volunteers. 4. Follow up with volunteers as needed to collect feedback. A successful survey process will collect the volunteer feedback survey from at least 80% of the organization's ongoing volunteers. 5. Implement feedback evaluation process and make adjustments to programs, policies, and procedures as needed.
Records are kept of what the volunteers are doing and results are shared with staff, community, and funders.	1. Ensure that all relevant parties use established volunteer tracking methods. Tracking methods should include volunteer activities, projects, and accomplishments. 2. Create impact measurement procedures for each volunteer position. 3. Create a plan to regularly share results of impact measurement of volunteer effort with all organization staff, funders, and community supporters, including the volunteers.

Indicator/Goals	Member Tasks
A plan to incorporate corporate volunteers in regular activity is created and a strategy to approach potential business partnerships has been developed.	1. Approach and potential business partners to research what type of volunteer program would be most attractive to their organization. Record feedback as received to inform corporate volunteering plans. 2. Assess organization needs that can be met with short-term or long-term corporate volunteers into regular, meaningful service opportunities. Document projects and roles for corporate volunteers that will meet organization needs. 3. Implement established plan to approach potential business partners, focusing on volunteer or financial partnership. Approach at least 3 potential business partners according to the developed strategy. 4. Create a recognition plan for corporate sponsors and their employee volunteers.
Volunteer retention rate is tracked, recorded, and analyzed.	1. Determine the minimum commitment time for each ongoing volunteer role. 2. Track the volunteer retention rate by documenting the number of volunteers who commit to a role and finish the minimum commitment of time and hours. The number of volunteers who complete the minimum commitment should be divided by the total number of volunteers who commit to serve in an ongoing role. 3. Record the retention rate at least twice annually and share with relevant volunteer program staff. 4. Analyze the volunteer retention rate, and use the analyzed trends to consider the cause behind any changes.
Management practices are documented to reflect the organization's best practices in correcting unacceptable volunteer behavior, including steps to release a volunteer.	1. Have the organization's human resources department, legal department, and/or program director have reviewed and approved the volunteer program policies and procedures to ensure they are aligned with the management best practices. 2. Compile all volunteer program policies and procedures in at least one location, readily available to all program staff. 3. Develop policies and procedures to define circumstances under which a volunteer should be released from the program, and steps to take to release

Indicator/Goals	Member Tasks
	a volunteer if necessary.
Structure for volunteer leadership is developed.	1. Create a hierarchy/structure of volunteer leadership. This should include a pathway for volunteers to gain more responsibility – including responsibility of overseeing, leading, or training other volunteers. Solicit input from all staff involved with the volunteer program to prepare appropriate tasks for volunteer leaders. 2. Create position descriptions for defined volunteer leadership roles.

Did you know?
Your Partner Site has "achieved proficiency" in one of the VCA standards when they have completed 8 of the 10 indicators/goals in that standard. We expect our Partner Sites to achieved proficiency in a new VCA Standard every year that they participate in VIP.

VCA Standard 3: Full Volunteer Program Implementation
The organization utilizes volunteers alongside staff to achieve its mission and has a plan to sustain the volunteer program. This standard and the associated areas that follow are usually completed in the third year of volunteer program development.

Indicator/Goals	Member Task
Ongoing training plan and materials have been developed and implemented.	1. Develop an ongoing training plan for each volunteer position, including skill development relevant to the volunteer role. 2. Define staff roles in volunteer training. Provide relevant staff members with train-the-trainer resources for ongoing volunteer trainings. 3. Develop training agendas and supplemental materials for volunteer trainings. 4. Provide 100% of volunteers with live or online training, or relevant training resources, at least once per year to develop skills relevant to their volunteer role.
Volunteer retention rate is high (70% or more).	1. Review trends in volunteer retention with the program director. Include a review of the experiences of volunteers, staff members, and clients to examine the experience of each volunteer. 2. Survey volunteers who have left the volunteer program to find out why they left and solicit feedback. 3. Review all volunteer program policies and structures. Identify weaknesses. This includes review of position descriptions and designs, management strategies, marketing plan, and screening processes, among other policies. 4. Incorporate program changes as needed until 70% volunteer retention is reached (or higher goal as set by Partner Site needs).
A system of identifying and training Volunteer Leaders is developed.	1. Develop procedures for screening selecting volunteer leaders. 2. Create a training plan for volunteer leaders that includes targeted development in leadership and management skills. 3. Develop training agendas for ongoing volunteer leader trainings. 4. Develop a performance evaluation for volunteer leaders.

Indicator/Goals	Member Task
Volunteers are integrated into the organizational structure at multiple levels.	1. Work with the program director to add current volunteer roles to the organizational structure. 2. Review current volunteer structure. Determine opportunities to incorporate volunteer roles at multiple levels of the organization. 3. Integrate volunteer roles into multiple levels of the organization structure, including roles in administration and supervision of other volunteers.
A system of tracking the effectiveness of volunteer marketing strategies is in place and results are utilized to inform ongoing efforts.	1. Keep records of how many volunteers are brought in through different marketing methods. Survey 100% of incoming volunteers to find out what made them choose to volunteer at the Partner Site. 2. Analyze trends in number of qualified incoming volunteers who cite different marketing methods. 3. Adjust marketing strategies to reflect avenues that bring in the highest number of qualified volunteers. Expand marketing efforts in avenues that have proven to bring in the most volunteers. Reevaluate or change strategies used in avenues that bring in fewer volunteers.
A system to receive staff feedback on the work of volunteers has been developed and implemented.	1. Create a survey designed to solicit staff feedback about the volunteer program. Categories may include feedback on current volunteer roles, program policies and structures, and ideas for improvement. 2. Create procedures around staff feedback, including a timeline for regular distribution and collection of the feedback survey (suggested at least one time annually) and process for review of feedback received. The evaluation process should include staff decision makers able to make appropriate changes to the program based on feedback received. 3. Distribute the volunteer feedback survey to 100% of staff members. 4. Follow up with staff as needed to collect feedback. A successful survey process will collect the staff feedback survey from at least 80% of the organization's staff members. 5. Implement feedback evaluation process and make adjustments to programs, policies, and procedures as needed.

Indicator/Goals	Member Task
Volunteer tracking systems are maintained and checked for accuracy on a regular basis.	1. Create procedures and a timeline for conducting internal audits on the volunteer tracking system at least one time annually. This should include checking volunteer sign in sheets against total number of recorded hours, checking the accuracy of volunteer information, and ensuring files are complete. 2. Conduct an internal file audit based on the created procedures.
There is a process to analyze volunteer feedback and to make adjustments to the program.	1. Ensure implementation of volunteer feedback survey procedures, including procedures around feedback evaluation process. 2. Develop reports or presentations to share the results of the volunteer feedback survey with all staff involved in the volunteer program. 3. With input from program staff, including the program director, create and implement an action plan in response to feedback received from the volunteer survey.
The organization has developed human resources and risk management policies that relate specifically to volunteers.	1. Working with the organization's Human Resources department or program director, compile a list of the organization's HR policies and resources that apply to volunteers. 2. Research relevant volunteer management and human resources laws to ensure that the organization's volunteer policies follow all applicable laws. This may involve legal consultation. Make adjustments to policies as needed to comply to local, state, and federal regulations. 3. Create a comprehensive human resources and risk management policy for volunteers, utilizing the organization's standard policies and any additional policies that are needed for volunteers. The organization's Human Resources department or program director must approve the policies.

Indicator/Goals	Member Task
Business partnerships provide the organization with regular volunteer support.	1. Approach at least 5 potential business partners according to the developed strategies. 2. Secure at least 2 business partnerships that provide the organization with regularly scheduled volunteer support. 3. Track the impact made by contributions from each business partner. Report these results to the business partner and other interested stakeholders. 4. Implement the recognition plan for business partners. 5. Maintain and expand established business partnerships by encouraging collaboration, increasing appreciation efforts, and ongoing communication with relevant contact persons.

Once a Partner Site has achieved proficiency in all three VCA Standards, they 'graduate' from VIP. Graduating organizations are well on their way to maintaining impactful volunteer programs thanks to the work of VIP Fellows like you!