# Volunteer Management Strategies:

# Balancing

# Risk

# Reward

## Managing volunteers is a balancing act. Here's a new strategy that makes it easier.

BY JANICE FORSYTH

With the trend toward shorter volunteer commitments, nonprofits are faced with maintaining effective programs while balancing volunteers' needs. This balancing act requires a layered approach that considers risks, resources, and rewards.

## Elements of a Volunteer Management Program

Judy Kent[1] has identified five elements of successful volunteer management:

◆ **Assessment of Needs:** First, ask yourself these assessment questions: How many volunteers does the organization need? What tasks need to be done? What skills should volunteers have?

◆ **Recruitment:** Next, devise a plan to identify and acquire the volunteers you need.

◆ **Risk Management Audit, Interviewing, and Screening:** Assess the risk involved with volunteer positions. Create job descriptions for volunteer positions. Ensure appropriate screening techniques.

◆ **Orientation, Training, and Monitoring:** Design an orientation process that helps volunteers understand their role. Provide a training program to develop needed skills. Initiate a continuous feedback and evaluation mechanism.

◆ **Retention and Recognition:** Develop techniques, events, and programs that acknowledge volunteers' contributions.

As you put these elements of a successful volunteer program into practice, you'll discover how difficult it is to achieve a proper balance. For one thing, you must respond to

volunteers' requests for short-term and one-time opportunities while maintaining longer-term volunteer assignments. Both are essential. You must preserve your volunteer program's integrity while devoting less time to some volunteer tasks.

At the same time, you must manage the risks associated with volunteer assignments—assessing what could go wrong and minimizing or avoiding the potential risk. You must "risk proof" volunteer positions that involve vulnerable populations. Vulnerable populations are those who are especially at risk because of their age or disabilities. Risk proofing involves conducting a risk management audit, in which you assess the following factors:

- type of client
- setting
- type of activity
- level of supervision

Based on your assessment, designate the volunteer position low, medium, or high risk. Then decide whether you will eliminate, modify, or assume the risk.[2]

With so many factors to consider, how do you balance the risks with the rewards of volunteerism? Looking at volunteer management through "layers" may be the answer.

## The Layers of Necessity Approach to Volunteer Management

Layers of necessity refers to the degree of intensity required for effective volunteer management. The higher the risk associated with a volunteer job, the more intensive the screening process must be, and the more attention you must pay to that volunteer.

The layers of necessity approach varies the degree of time and attention for each of the five elements of effective volunteer management to ensure the efficiency and success of the placement. This approach was developed by Tessmer and Wedman for the instructional design field.[3] They considered time, budgetary needs, and the resources available to the instructional designer and created layers to accommodate the varying levels of need. We have adopted this model to volunteer management, as outlined in Figure 1.

*You must "risk proof" volunteer positions that involve vulnerable populations.*

There are, as Figure 1 shows, three layers of intensity:

**Layer 1** includes short-term volunteer opportunities such as one-time events, annual fundraising activities, or short-term program assistance ranging from a few hours to a few months. These volunteer positions are usually very low risk, with no access to vulnerable populations.

**Layer 2** involves longer commitments, usually two to 12 months. Volunteer positions involved directly with programs and services often fall into this category. So do ad hoc board committees. Such committees are directed to a specific task and disbanded when the task is completed.

**Layer 3** is the most intensive. It accommodates nonprofits' need for long-term volunteer commitments. Organizations that provide services to vulnerable populations usually require at least a one-year commitment. This is particularly important when the volunteer works directly with clients. The long-term volunteer position usually involves extensive screening, supervision, and evaluation. Board positions also fall into this layer, since they usually require at least a one-year term.

## Which Layer Should You Select?

When deciding what layer a volunteer job fits into, consider these factors:

1. **Time and Resources:** the length of the volunteer task and the human resources and materials needed to complete it.
2. **Impact and Risk:** the impact the volunteer task has on the organization and the degree to which loss, injury, or harm might occur during its completion.

For example, short-term, one-time events probably require less intensity in the steps of the volunteer management cycle. Long-term volunteer assignments are more time-intensive in
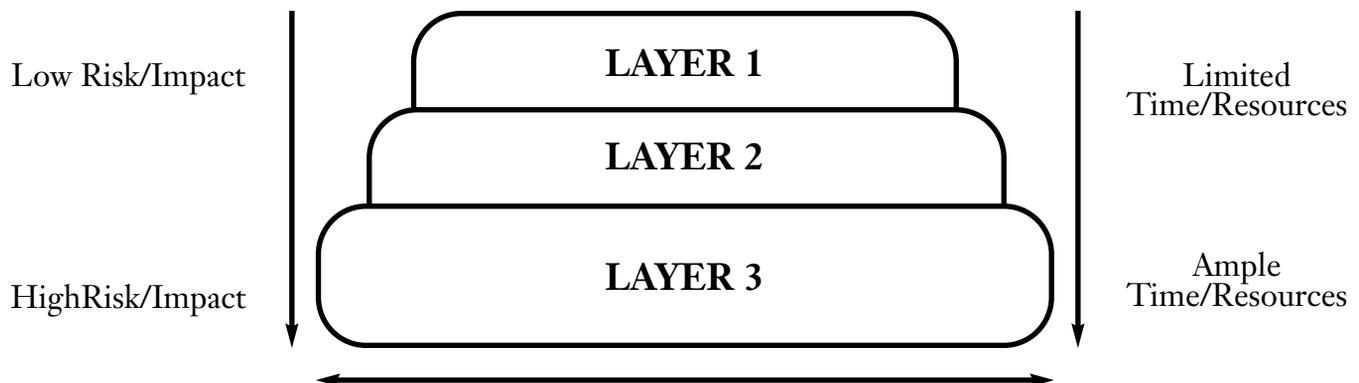
## FIGURE 1.  THE LAYERS-OF-NECESSITY MODEL



Low Risk/Impact — LAYER 1 — LAYER 2 — LAYER 3 — HighRisk/Impact

Limited Time/Resources — Ample Time/Resources

## FIGURE 2.  MATRIX FOR SELECTING THE PROPER LAYER

|  | Low Impact & Risk | High Impact & Risk |
|---|---|---|
| **High** Time & Resources | 2 | 3 |
| **Low** Time & Resources | 1 | 3 |

## FIGURE 3. HOW TO INTEGRATE VOLUNTEER-MANAGEMENT ELEMENTS WITH LAYERS-OF-NECESSITY APPROACH

| Layer of Necessity | Assessment of Needs | Recruitment | Risk Management Audit, Interviewing, and Screening | Orientation, Training and Monitoring | Retention and Recognition |
|---|---|---|---|---|---|
| **#1** | ❖ identification of tasks and number of volunteers | ❖ target groups of people<br>❖ mass promotion and advertising | ❖ risk management audit<br>❖ phone interview<br>❖ minimal screening<br>❖ direct referral | ❖ task specific training "on the job" | ❖ names entered into database for future events<br>❖ admission to event<br>❖ letter of thanks |
| **#2** | ❖ identification of skills is required | ❖ more specialized recruitment needed<br>❖ methods may include mass promotion and targeted recruitment | ❖ risk management audit<br>❖ face to face interview optional<br>❖ screening as determined by nature of volunteer position | ❖ short orientation<br>❖ task specific training<br>❖ ongoing training as required<br>❖ spot checks | ❖ ongoing supervision<br>❖ verbal recognition<br>❖ public recognition<br>❖ annual recognition |
| **#3** | ❖ identification of skills, qualifications, and specific tasks | ❖ very specialized<br>❖ targeted recruitment<br>❖ presentations to potential groups | ❖ risk management audit<br>❖ face to face interview<br>❖ extensive screening | ❖ position specific orientation and training prior to volunteer assignment<br>❖ ongoing supervision, training, and evaluation<br>❖ spot checks | ❖ identification of motivations and planning<br>❖ determine most effective methods<br>❖ public & annual recognition |

terms of each of the steps. Use the matrix in Figure 2 to help choose the proper layer for each volunteer assignment. Once you've selected a layer, use Figure 3 to integrate the elements of volunteer management with the layers of necessity.

## The Future of Volunteer Management

Accelerated technology, lifestyle changes, high unemployment, and increased competition for volunteers are factors volunteer managers are facing. To continue to meet community needs, organizations must be creative and flexible in managing volunteers. Being aware of the changing demographics in your community means adapting your volunteer management system to respond to changing needs. Developing a layers-of-necessity approach to volunteer management can be an important part of that response. ■

### Footnotes

[1] Judy Kent elaborates these elements in the manual *Effective Organizations: A Consultant's Resource*, published by the Skills Program for Management Volunteers, Ottawa, Ontario, Canada, 1992.

[2] For details on risk management strategies for volunteer programs, see Muehrcke, *Volunteer Liability and Risk Management*, in "Selected References."

[3] Tessmer, M. & Wedman, J., "A Layers-of-Necessity Instructional Development Model," *Educational Technology Research and Development*, 38 (2), 1990, 77-85.

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