

**WORKSHEET**

**Task-based Volunteer Management**

Task:

Task Date(s):

<b>General Considerations</b>
Who will supervise the volunteer(s)? Who is assigned to complete each task? By what deadline?
Does your organization have or need proper liability insurance for this project?
What are the safety concerns? Are you working with minors, seniors, etc?
What can volunteers do <i>next</i> ? What are your upcoming events, projects, meetings, individual or ongoing tasks?
Where will you store volunteer information, both electronic and physical?
Will volunteers be reimbursed for mileage, expenses, etc?
Have you prepared a job description for potential volunteers? <i>Use WORKSHEET: Volunteer Position Description on p. 48.</i>
Should you conduct interviews for this task/position?

<b>BEFORE</b>	<b>Assigned to</b>	<b>Deadline</b>
1. Choose task(s) <i>See "Documenting Rural Volunteer Practices" p. 9-36 for ideas.</i>		
2. Identify "real" work needed to be done <i>Use WORKSHEET: Volunteer Task Assignments on p. 44.</i>		
3. Identify possible individuals and groups suitable for tasks <i>Use WORKSHEET: Volunteer Management Inventory on p. 38.</i>		
4. Contact potential volunteers <i>How will they benefit from their involvement? Who is the best person to contact them? Does anyone know these potential volunteers personally?</i>		
<i>If no,</i>	<ul style="list-style-type: none"> <li>• Thank them for their time.</li> <li>• Inform them of any other events that are happening soon that may interest them.</li> <li>• Offer to add them to your mailing list to learn about upcoming events.</li> </ul>	
<i>If yes,</i>	Provide individual(s) with necessary logistics: <ul style="list-style-type: none"> <li>• What time should they arrive? Where? Provide time, location, directions, where to park, etc.</li> <li>• What do they need to wear? What are your standards of conduct?</li> <li>• What will be provided? Is a computer, phone, desk, chair, coffee mug, etc. available for them? Do they need to obtain permission or clearance to use equipment or facilities?</li> <li>• Based on what can be provided, what should they bring? Do they need to bring lunch? Can they buy food at or near site? Are certain supplies or tools needed?</li> <li>• Are the office staff/other volunteers prepared for the incoming volunteer? Do they know what the volunteer will be doing and for whom?</li> </ul>	

<b>DURING</b>		<b>Assigned to</b>	<b>Completed?</b>
<i>Before you start working:</i>			
Conduct brief orientation.			
	Give an overview of your organization's history, mission, goals, programs, services and organizational structure		
	Explain how volunteer is helping the "big picture"		
	Review office policies and procedures such as dress code, conduct, attendance and who to contact if volunteer will be late/absent <i>Create timesheet using TEMPLATE: Volunteer Timesheet on disc.</i>		
	Distribute and collect Volunteer Information Sheet (p. 45) and Volunteer Liability Release (p. 46-47) forms. <i>If volunteers are under 18, these must be signed by a parent/guardian in advance.</i>		
	What are they doing today? Identify safety concerns. <i>Be aware of any medical conditions or allergies noted on Volunteer Information Sheets.</i>		
	Give tour of office and introduce coworkers		
	Identify location of things needed throughout work day: Restrooms, refreshments, office supplies, safe place for personal belongings, individual(s) to alert in emergency...		
	Set up and review function of phone, email, fax machine, etc.		
<i>Throughout task or project:</i>			
	Conduct regular check-ins <ul style="list-style-type: none"> <li>• Give positive and constructive feedback</li> <li>• Provide and receive updates</li> </ul>		
	Determine next assignment as necessary		
<i>When finished:</i>			
	Conclude task or project: <ul style="list-style-type: none"> <li>• Reiterate what was accomplished and how it helps on a larger scale</li> <li>• Thank volunteer for time and effort</li> <li>• Remind them of upcoming events and other volunteer opportunities</li> <li>• Distribute and collect Volunteer Evaluation (p. 51)</li> </ul>		

<b>AFTER</b>	<b>Assigned to</b>	<b>Deadline</b>
Add information given on Volunteer Information Sheets to database. <i>Use TEMPLATE: Volunteer Information Database included on workbook disc.</i>		
Add new volunteer(s) to mailing list <ul style="list-style-type: none"> <li>• Send them a message welcoming them to the mailing list</li> </ul>		
Send a "thank you" note <ul style="list-style-type: none"> <li>• Restate what was accomplished</li> <li>• Give any information about future progress of that project</li> <li>• Include upcoming events and membership information</li> <li>• If not already completed, send Volunteer Evaluation (p. 51)</li> </ul>		
File Volunteer Information Sheet and Volunteer Liability Release in central known location.		
Add Volunteer Evaluation responses to database. <i>Use TEMPLATE: Volunteer Evaluation Database included on workbook disc.</i>		
Inform entire organization of accomplishments (at a meeting, in newsletter, or special email). Include: <ul style="list-style-type: none"> <li>• Who was involved</li> <li>• What was accomplished</li> <li>• Feedback gathered from Volunteer Evaluation</li> </ul>		