**Instructions:** Successful involvement of volunteers requires the basic components listed below. Please complete this assessment to help us identify the strengths and weaknesses of our volunteer involvement efforts.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Essential Elements of Volunteer Engagement** | | | | | |
| **Organizational Support and Readiness** | | **Not currently**  **being done** | **Somewhat in place** | **Being done to a large degree** | **Not applicable**  **or relevant** |
| 1. Written statement of philosophy related to volunteer involvement | |  |  |  |  |
| 1. Sufficient resources, budget, staff, space and equipment allocated for volunteer involvement. | |  |  |  |  |
| 1. Designated volunteer resources manager is included in top-level planning | |  |  |  |  |
| 1. Staff and board leadership trained to work effectively with volunteers | |  |  |  |  |
| 1. Volunteers are integrated at all levels or within all units of the organization | |  |  |  |  |
| **Comments** |  | | | | |
| **Planning for Engagement** | | **Not currently**  **being done** | **Somewhat in place** | **Being done to a large degree** | **Not applicable**  **or relevant** |
| 1. Volunteer assignments are aligned with organizational priorities and outcomes | |  |  |  |  |
| 1. Organizational budget reflects expenses related to volunteer involvement | |  |  |  |  |
| 1. Assessments to determine how volunteers should be involved with the organization | |  |  |  |  |
| 1. Periodic risk management assessment related to volunteer roles | |  |  |  |  |
| 1. Liability insurance coverage for volunteers | |  |  |  |  |
| **Comments** |  | | | | |
| **Effective Recruitment and Cultivation** | | **Not currently**  **being done** | **Somewhat in place** | **Being done to a large degree** | **Not applicable**  **or relevant** |
| 1. Written position descriptions for all volunteer assignments | |  |  |  |  |
| 1. Volunteer assignments are designed for a wide range of skills and interests | |  |  |  |  |
| 1. Specific strategies developed for ongoing volunteer recruitment and cultivation | |  |  |  |  |
| **Comments** |  | | | | |
| **Onboarding (Screening, Placement, Orientation and Training)** | | **Not currently**  **being done** | **Somewhat in place** | **Being done to a large degree** | **Not applicable**  **or relevant** |
| 1. Standardized screening procedures to determine appropriate placement of volunteers | |  |  |  |  |
| 1. Consistent general orientation for all volunteers | |  |  |  |  |
| 1. Consistent training is provided to all volunteers | |  |  |  |  |
| **Comments** |  | | | | |
| **Supervision and Support** | | **Not currently**  **being done** | **Somewhat in place** | **Being done to a large degree** | **Not applicable**  **or relevant** |
| 1. Designated supervisors for all volunteer roles | |  |  |  |  |
| 1. Written policies and procedures for volunteer involvement | |  |  |  |  |
| 1. Periodic assessments of volunteer performance | |  |  |  |  |
| 1. Consistent activities for recognizing volunteer contributions | |  |  |  |  |
| **Comments** |  | | | | |
| **Record Keeping and Evaluation** | | **Not currently**  **being done** | **Somewhat in place** | **Being done to a large degree** | **Not applicable**  **or relevant** |
| 1. Maintain accurate records on volunteers and collect information on volunteer involvement | |  |  |  |  |
| 1. Results of volunteer involvement is measured and regularly shared with stakeholders | |  |  |  |  |
| 1. Volunteer feedback and input actively solicited | |  |  |  |  |
| 1. Periodic Assessment of volunteer assignments to ensure alignment with organizational priorities | |  |  |  |  |
| 1. Periodic assessments of staff support for volunteers | |  |  |  |  |
| Comments |  | | | | |

**(***Adapted from: A Guide to Investing in Volunteer Resources Management: Improve Your Philanthropic Portfolio,)*