

eToolkit

Engaging Volunteer Leaders: Going from Doing it All to Getting it Done



Table of Contents

Section One

Case Study: Vigil Volunteer Leaders Build Lasting Capacity	3
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Section Two

Engaging Volunteer Leaders	4
Advocate for Engaging Volunteer Leaders	5
Tool #1: Building Support for Engaging Volunteer Leaders	6
Identify Needs and Plan the Work	7
Tool #2: Checklist to Assess Needs and Readiness	8
Tool #3: Project Work Plan	9
Delegate and Support	11
Tool #4: Delegation Plan	12
Tool #5: Support Plan	13
Develop Current and Future Leaders	14
Tool #6: Individual Volunteer Plan	15

Section Three

Moving Forward	16
Resources	17

SECTION ONE

Case Study: Vigil Volunteer Leaders Build Lasting Capacity

More than 250 dedicated volunteers are essential partners in providing care to the patients and families whom Home Health & Hospice Care serves throughout the greater Nashua and Manchester area of New Hampshire. Prior to the Coronavirus pandemic, volunteers supported patients in every environment—home, nursing home and assisted living facilities, the Community Hospice House, and behind the scenes. Though safety concerns forced adaptations to service delivery during the pandemic, volunteers continue to provide vital support to patients and families. Among those volunteer roles are vigil volunteers.

Specially trained vigil volunteers provide presence and comfort to patients who are actively dying. While Home Health & Hospice Care's volunteer coordinator had capacity to manage and schedule volunteers across the organization, the growing need to schedule vigil volunteers posed unique and time-consuming challenges. Not only is the timing for vigil need somewhat unpredictable and often immediate due to changes in patient status, the length of time each patient will need vigil volunteers varies case by case, requiring constant check-in and assessment. Consequently, several years ago, Home Health & Hospice Care set out to engage volunteer leaders to build the capacity of the vigil program beyond what the volunteer coordinator alone could achieve.

Vigil Team Leaders have two primary responsibilities: scheduling and supporting the vigil volunteers in the field, thereby relieving the volunteer coordinator of needing to be available all day, seven days a week to respond to vigil requests and schedule accordingly. Vigil Team Leaders also help the coordinator build capacity to check in with vigil volunteers. Even now, many years after this role was first developed, Home Health & Hospice Care (HHHC) continues to reap the benefits of this leadership position:

- HHHC was able to grow the program without hiring additional staff.
- The new model made for increased responsiveness and vigil capacity, enhancing both service and satisfaction.
- HHHC had a meaningful way to engage skilled volunteers.
- Other staff members noticed the impact of the volunteer leaders and began to identify new opportunities for leadership volunteers in other programs.

"Even as vigil work was greatly restricted during the pandemic," explains the volunteer coordinator, "one of our Vigil Team Leaders reached out and maintained relationships. She has become a trusted partner, providing emotional support to volunteers, not to mention adding depth to our management team."



“ Before we had Vigil Team Leaders, I was challenged by the prospects of scaling our volunteer program and the services we provide. I wasn't lacking in volunteers, but bandwidth to deploy them quickly in time-sensitive, end of life scenarios. Creating the role of Vigil Team Leaders has been a light at the end of the tunnel. It not only gave us a model for effectively scaling our program, but also gave highly engaged volunteers the opportunity to grow through leadership and find new meaning in their hospice volunteering.”

Home Health & Hospice Care
Volunteer Coordinator

SECTION TWO

Engaging Volunteer Leaders

While the nonprofit and public sectors have been evolving over many decades, one thing that hasn't changed is the ongoing challenge of having enough people and time to get the work done. Volunteers play a vital role in closing that gap between what organizations have capacity to achieve and all that is possible. Yet, engaging more volunteers is not necessarily the answer, since leading, managing, and supporting volunteers also requires people and time. That's where engaging volunteers as leaders can make all the difference. Volunteers can lead teams, projects, and even change. Volunteer leaders can help organizations to build capacity while also:

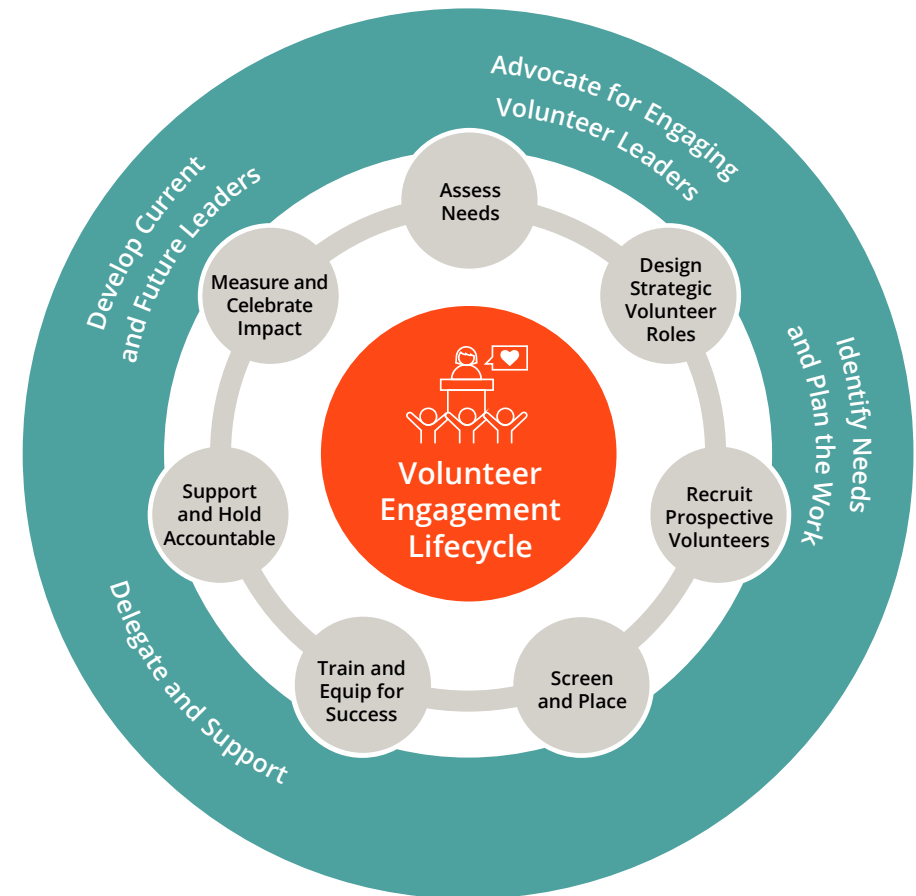
- Relieving staff members' workload.
- Building meaningful relationships with other volunteers.
- Bringing new skills and perspectives to the organization.

While engaging volunteers in any role should involve **assessing needs, crafting volunteer position descriptions, recruiting and screening thoughtfully, equipping those volunteers for success, and measuring and celebrating their impact**, engaging volunteers as leaders can pose some additional challenges to the volunteer lifecycle. Effectively empowering volunteers as leaders may require overcoming resistance from colleagues, more thoughtful work planning, garnering sufficient resources to train and support the volunteer leaders, honing delegation skills, and investing in their leadership development.

This guide features tools that are important to add to any volunteer engagement professional's tool belt. They are designed to enhance—not replace—existing volunteer engagement practices. When seeking to tap the potential of volunteer leaders, these tools will help you:

- Advocate for volunteer leaders by reducing barriers.
- Identify needs and plan the work.
- Delegate the work and support volunteer leaders to success.
- Develop current and future leaders.

Engaging Leaders in the Volunteer Lifecycle



Advocate for Engaging Volunteer Leaders

Volunteer leaders can build the capacity of staff throughout an organization, yet many professionals are reluctant to empower volunteer leaders because they are uncomfortable delegating responsibilities. Effectively advocating for volunteer leadership requires not only an ability to articulate the benefits of engaging volunteer leaders but also understanding what gets in people's way of delegating and being able to reduce the barriers to delegation.

Staff reluctance to delegation can stem from multiple sources, including:

- **Lack of skills** to effectively delegate.
- **Fear of being replaced** by volunteers.
- **Resistance to changing** how work gets done.
- **Reluctance to give up control** over the work.
- **Past experiences** that did not go well.
- **Lack of trust** in volunteers' ability to be successful.

Complete the Building Support for Engaging Volunteer Leaders tool (on page 6) to help you advocate and inspire colleagues to engage volunteer leaders in their work.



Consider what gets in the way of delegating responsibilities to volunteers. By understanding the concerns that underlie these barriers, you will be better able to inspire others to overcome obstacles to delegation.

Tool #1 will help you discover what gets in the way of delegating responsibilities to volunteers.



TOOL #1

Building Support for Engaging Volunteer Leaders

Consider what gets in the way of delegating responsibilities to volunteers. This chart is partially completed. For each listed barrier, fill in any additional underlying concerns your colleagues may be experiencing as well as additional tactics that you can leverage to mitigate those barriers. Then, prioritize 3-4 steps you can take soon to build support and inspire others to engage volunteer leaders.

Common Barrier

Underlying Concerns

Tactics to Overcome the Barrier

Lack of skills

I don't know how to engage or support a volunteer leader.

Provide training on project scoping, delegation, and holding volunteers accountable.

Fear of being replaced or outshined

What if the volunteer outshines me? Would a successful volunteer leader mean I am not needed anymore?

Incorporate engaging volunteers in staff position descriptions and build into performance reviews.

Resistance to change

Things have been going just fine until now. I don't want to make the effort to do things differently.

Share stories of innovations that drove success in the past.

Reluctance to give up control

Having a volunteer leader won't save me any time if I have to supervise every step of this process.

Provide training on how to delegate effectively, with work planning and regular check-ins.

Past experiences

I've tried this before and it was a disaster.

Involve staff in developing criteria for screening and selecting volunteer leaders so they buy into the placement.

Lack of trust in volunteers

Having a volunteer fall short in this project will reflect badly on me.

Provide training on screening and selecting qualified volunteers and share tools on work planning and accountability.

Others

Once the chart is complete, select the 3-4 tactics you will communicate and implement as you build support for engaging volunteer leaders.

1.

2.

3.

4.

Identify Needs and Plan the Work

Building support for engaging volunteer leaders sets the stage for successful volunteer leadership but ensuring that the role addresses a true organizational need and planning the work are equally vital. Whether leading a team or a project, volunteer leadership should be deployed toward a purpose that is authentic and pressing.

To identify needs that volunteer leaders can help address, you can:

- Review strategic plans to identify organizational priorities.
- Assess internal processes to identify gaps that a volunteer may be able to close.
- Have staff review departmental and personal action plans to identify areas where success is constrained by capacity.
- Consider which programs or initiatives the organization wishes to expand or replicate.

Once you have a list of possible needs, use the checklist (on page 8) to assess whether the need is appropriate and the organization is ready to engage volunteers as leaders, then develop a detailed work plan to guide the effort.

Extending Capacity of Clinical Staff

Inspired, in part, by the success of the Vigil Volunteer Leaders at Home Health & Hospice Care in New Hampshire, clinical staff at the Community Hospice House requested volunteer support in admitting new patients. The admission process was taking hours for each patient, as clinicians were balancing the needs of both the patient and the family coming in the door. While getting a patient settled and comfortable requires clinical expertise such as pain management, they recognized that skilled volunteers could lead the effort to receive and introduce the family to the Hospice House.

Volunteers welcome the family, tour and orient them to the building, answer questions and provide reassuring feedback, and gather information about their loved one which might assist in making them more comfortable (like favorite foods and music). Creating the new role of Family Ambassador provided an opportunity for volunteers ready to take on more leadership to step up and partner directly with clinical staff and serve as an ongoing liaison with the family moving forward. Engaging Family Ambassadors has also proven to save staff time and enhance the hospice experience for patients and families.



TOOL #2

Checklist to Assess Needs and Readiness

Before confirming the project or need for volunteer leadership, use this checklist to ensure that the leadership role will be strategic, appealing to prospective volunteers, and sufficiently supported.



The volunteer leader will be addressing a need that...

- ☐ Is pressing.
- ☐ Aligns with strategic priorities.
- ☐ Will build momentum.



The volunteer leadership role will be...

- ☐ Meaningful.
- ☐ Enjoyable.
- ☐ Realistic for one person or co-leads.
- ☐ Sustainable.



The organization has...

- ☐ Staff to champion the effort.
- ☐ Staff or experienced volunteers to provide the necessary support to volunteer leaders.
- ☐ Current or prospective volunteers with the skills and time to carry out this role (or be trained to do so).
- ☐ Capacity and resources needed to support volunteer leaders with training, technology, and space.
- ☐ A culture to support meaningful volunteer leadership.
- ☐ Effective ways to track the impact of volunteer leaders.
- ☐ A plan for meaningful recognition.

Project Work Plan

Whether engaging a volunteer to lead a project or a team, the endeavor will benefit from a detailed work plan to define scope, identify the necessary resources, guide the work, and keep the effort on track. Refer to sample Placement Team Work Plan (on page 10).

**Vision**

Describes the purpose and meaning of the endeavor and what will be different as a result of the effort.

**Resources**

Outlines what is needed for success, including people, money, time, space, training, supplies, and more.

**Actions**

Lists the activities that need to happen, including the steps to be taken, who should be involved, and timing.

**Yield**

Delineates the quantifiable results, also known as “outputs,” and describes how many, percentage, etc.

**Initial Impact**

Describes what will be different in the near term.

**Sustained Outcome**

Explains the longer-term, lasting results which often address deeper roots of the challenge at hand.

**Indicators and Milestones**

Articulates specific, measurable, observable changes that reveal progress against the plan.

Sample: Placement Team Work Plan

In this project plan, experienced volunteers interview and make placement recommendations for volunteer applicants.

Vision

- A volunteer team will conduct initial scheduling, screening, and placement of most volunteers, saving staff time and modelling high level volunteering from the first interaction.

Resources

- Time and support for cultivating Team Leaders
- Information on cutting edge behavioral interviewing techniques
- Access to staff for training and scheduling

Actions

- Select and support Team Leader(s)
- Create training for volunteer interviewers
- Recruit and place volunteer interviewers
- Implement training
- Communicate new initiative to internal and external stakeholders
- Develop an evaluation plan
- Assess process and adjust accordingly

Yield

- Within 6 months, 30 new volunteers placed by volunteers
- Within 6 months, at least 12 volunteers trained and dedicated to volunteer placement
- Within 9 months, at least 2 volunteer trainers

Initial Impact

- More efficient response to staff requests for volunteers
- Shorter time between application and placement for prospective volunteers
- Higher retention rates with volunteer placements

Sustained Outcome

- Staff ability to post positions for any need and expect placement of qualified volunteers
- Greater capacity to achieve mission
- Improved customer service experience

Indicators and Milestones

- After 9 months, individuals will receive a call to schedule an interview within 48 hours of submitting a volunteer application and interviews will be scheduled within 5 business days of the call.
- 90% of volunteer placements will work out.
- Volunteer Services staff will spend less time on interviewing.
- The organization will increase capacity to engage volunteers by 10% in first year and by another 10% in second year of initiative.



Delegate and Support

Once you have built support for engaging volunteer leaders and crafted a work plan, it is time to cultivate a leader. As with any recruitment effort, you can look externally and recruit from the community at large, but you can also look internally for an emerging leader. Along with standard recruitment strategies of online search engines, tapping social media networks, and peer to peer recruitment, consider who among your current volunteers may be ready to move up and take on more responsibility.

Potential and emerging leaders often:

- Express aspirations.
- Take initiative.
- Ask great questions.
- Offer solutions.
- Problem solve well.
- Follow through.
- Care about meeting and evaluating results to make sure they're on target.
- Take on progressive responsibility—and handle it well.
- Improve after feedback.

After placing a qualified volunteer leader, the delicate art of delegation and support begins. Delegation does not come naturally as many people are hesitant to give up control. However, effective delegation means setting clear

expectations around who has authority for each element of the work. For any volunteer-led initiative, the staff and volunteer leader should agree upon the intended results. For example, the agreed upon purpose of a tutoring program fundraising project might be raising \$5,000 to buy new books. The delegation process should involve clearly articulating the degree to which the volunteer leader can determine how those funds will be raised. Can she and the fundraising team develop a new fundraising event? If so, who approves the event budget? What role will the staff member play in making decisions or approving recommendations by the volunteer team? Use the Delegation Plan worksheet to think through the level of delegation and communicate clearly with volunteer leaders of in your next project.

While delegation involves empowering others to get work done, such empowerment does not mean a lack of support. We can—and should—delegate authority to volunteer leaders while also supporting them. Use the Support Plan to ensure each volunteer leader has a designated support person and that this support person has time set aside to communicate, nurture accountability, help problem solve as needed, and recognize the volunteer and team along the way.



To build a culture of support, regularly reflect on these questions.

Does the volunteer leader:

- Know what is supposed to be accomplished?
- Have sufficient authority to accomplish it?
- Have the skills and knowledge to succeed?
- Know how success will be measured?
- Know whether s/he is succeeding?
- Feel recognized?

“Delegating well helps leaders maximize their resources, ensuring that they're focusing on their highest priorities, developing their team members, and creating a culture where delegation isn't just expected—it's embedded in the culture.”

Deborah Grayson Riegel

“8 Ways Leaders Delegate Successfully,”
Harvard Business Review

TOOL #4

Delegation Plan

Delegation is more than simply assigning tasks. Effective delegation involves clearly communicating levels of authority. Breakdowns in delegation usually can be traced to lack of clarity around such details as level of authority. When engaging a volunteer leader, determine the delegation level and communicate with the volunteer leader so that everyone understands and agrees.

Consider these levels of delegation:¹

- **Level 1: Follow my instructions.** Make it clear that your directions need to be followed as given.
- **Level 2: Gather information and report.** Assign volunteers to gather information and report on findings. Make it clear that you will discuss the findings, but the decision is up to you.
- **Level 3: Investigate and make recommendations.** Assign research and request a report with recommendations. You will still need to approve actions moving forward.
- **Level 4: Authority to decide.** Grant authority to the volunteer leader to make a decision, while being clear that you still expect to be kept informed.
- **Level 5: Authority to act independently.** Authorize volunteer leaders to do whatever they think is best without the expectation that they will report back.

To help determine—and communicate—the delegation level, answer these questions:

What research needs to be done or information gathered prior to developing an action plan?

What role do you expect to play in determining those actions?

Does the volunteer leader have enough experience and information to make recommendations about actions?

Does the volunteer leader have enough experience and information to make decisions about actions?

What information do you need along the way?

What information would you like to receive along the way?

Based on your answers, which level of authority (Level 1, 2, 3, 4, or 5) makes sense for this project and this volunteer leader?

How and when will you discuss this level of authority with the volunteer leader?

¹ Adapted from Michael Hyatt, [“The Easier Way to Delegate for Perfect Results.”](#)

Support Plan

Complete the following chart to ensure that each volunteer leader has a designated support person and a plan for checking in regularly. The Support Plan should be used in conjunction with the Work Plan.

Volunteer Leader Title	Staff Partner/Supervisor	Date of First Meeting to Define Expectations	Checkpoint Schedule (How often will you check in?)	Communication Plan (How will you communicate in between formal check ins?)	Checkpoint Dates and Milestones
<i>E.g., Volunteer Placement Team Leader</i>	<i>E.g., Director of Volunteer Engagement</i>	<i>E.g., September 15 (following orientation)</i>	<i>E.g., Once every 2 weeks for the first 3 months, then at least monthly</i>	<i>E.g., Weekly updates to volunteer management software with interview #s and results; Call with any questions</i>	<i>E.g., December 15 (3 month evaluation of system); March 15 (6 month check in on system)</i>

Develop Current and Future Leaders

Volunteer leadership is a capacity building strategy. To sustain the strategy, organizations must invest in volunteer leaders through training and development. Such support demonstrates to volunteers that the organization values their unique skills and commitment. In turn, volunteers are more likely to maintain their dedication to the organization.

Individualized support tailored to personal aspirations and needs can transform an emerging leader into a competent leader—and can elevate a current leader into a deeply committed one. The Individual Volunteer Plan is a practical, collaborative tool designed to facilitate conversation between volunteers and staff partners about pathways to leadership.

By working through the tool together, staff and volunteers:

- Assess the volunteer's current competencies.
- Explore areas for growth.
- Identify opportunities for training, mentoring, and coaching.
- Commit to providing training and new leadership responsibilities.
- Schedule a time to reevaluate and update the plan.
- Celebrate the value of volunteer contributions.



Individualized support tailored to personal aspirations and needs can transform an emerging leader into a competent leader—and can elevate a current leader into a deeply committed one.

Individual Volunteer Plan

Use this plan to customize a volunteer engagement career to meet the volunteer's aspirations and the organization's needs.

Volunteer:

Date:

Support Liaison (Supervisor):

Current Competencies

Baseline assessment of the volunteer's current knowledge, abilities, and accomplishments across core competencies that you or your organization has identified.

- 1.
- 2.
- 3.
- 4.
- 5.

Goals and Benchmarks

Together, choose skills, competencies, and experiences on which to focus. For each focus area, set a goal and some benchmarks so that you can both assess progress toward each goal.

- 1.
- 2.
- 3.
- 4.
- 5.

Additional Needs

Add services, equipment, special accommodations, or other resources the volunteer will need to successfully reach the identified goals.

- 1.
- 2.
- 3.

Signatures

Volunteer:

Supporter (Supervisor):

Executive Director:

Date for Next Progress Review:

Updates

SECTION THREE

Moving Forward

Most volunteers are motivated by the desire to make a difference and serving as a leader is one of the most impactful contributions volunteers can make. Whether leading a team, a project, or change, volunteer leaders build capacity by helping the organization harness the abundant talent of volunteers, even amid a scarcity of other resources.

While some people may be reluctant to engage volunteers as leaders, you can mitigate those obstacles through training, advocacy, and partnering with volunteer leaders yourself. Use the tools in this guide to create meaningful leadership opportunities in your own area. There is no better way to inspire others than by modeling the change you wish them to embrace! By providing volunteer leaders with training that moves them up the leadership ladder, you will transform individuals into leaders and model a strategy that can sustain your organization.



By providing volunteer leaders with training that moves them up the leadership ladder, you will transform individuals into leaders and model a strategy that can sustain your organization.

Resources

Engage Journal

The global voice of leaders of volunteer engagement. (formerly e-Volunteerism)

<https://engagejournal.org/>

Kelly, Colleen and Lynda Gerty

The Abundant Not-for-Profit: How Talent (Not Money) Will Transform Your Organization. Vantage Point. 2013.

Steinhorn, Beth

Enhancing the Volunteer Lifecycle. Sterling Volunteers.

<https://offers.sterlingvolunteers.com/enhancingvolunteerlifecycle>

Taproot Foundation

Powered by Pro Bono: The Nonprofit's Step-by-Step Guide to Scoping, Securing, Managing, and Scaling Pro Bono Resources. Jossey-Bass. 2012.

Special thanks to our guest author, Beth Steinhorn, President, VQ Volunteer Strategies

About VQ Volunteer Strategies

Beth Steinhorn partners with organizations and their leadership to increase their impact through strategic and innovative engagement. The author of multiple books and articles on strategic volunteer engagement, she is a popular speaker and trainer. As a thought leader, Beth regularly participates in the national dialogue about volunteerism and engagement. Prior to becoming a consultant, Beth worked as an executive director and marketing director with education and faith-based organizations and spent years as a museum educator, manager, and anthropologist. She draws upon her anthropology experience still, helping organizations through the culture shift process – from viewing volunteer management as a program to embracing engagement as a strategy to fulfill mission.

Sterling Volunteers is dedicated to the nonprofit and service sector, helping organizations fulfill their service missions and positively impact communities. We represent the largest network of vetted volunteers, millions of people ready to mobilize when opportunities arise, helping simplify the volunteer recruitment process. Sterling Volunteers is a division of Sterling, which has pioneered innovation in background screening and identity services for more than 45 years.
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