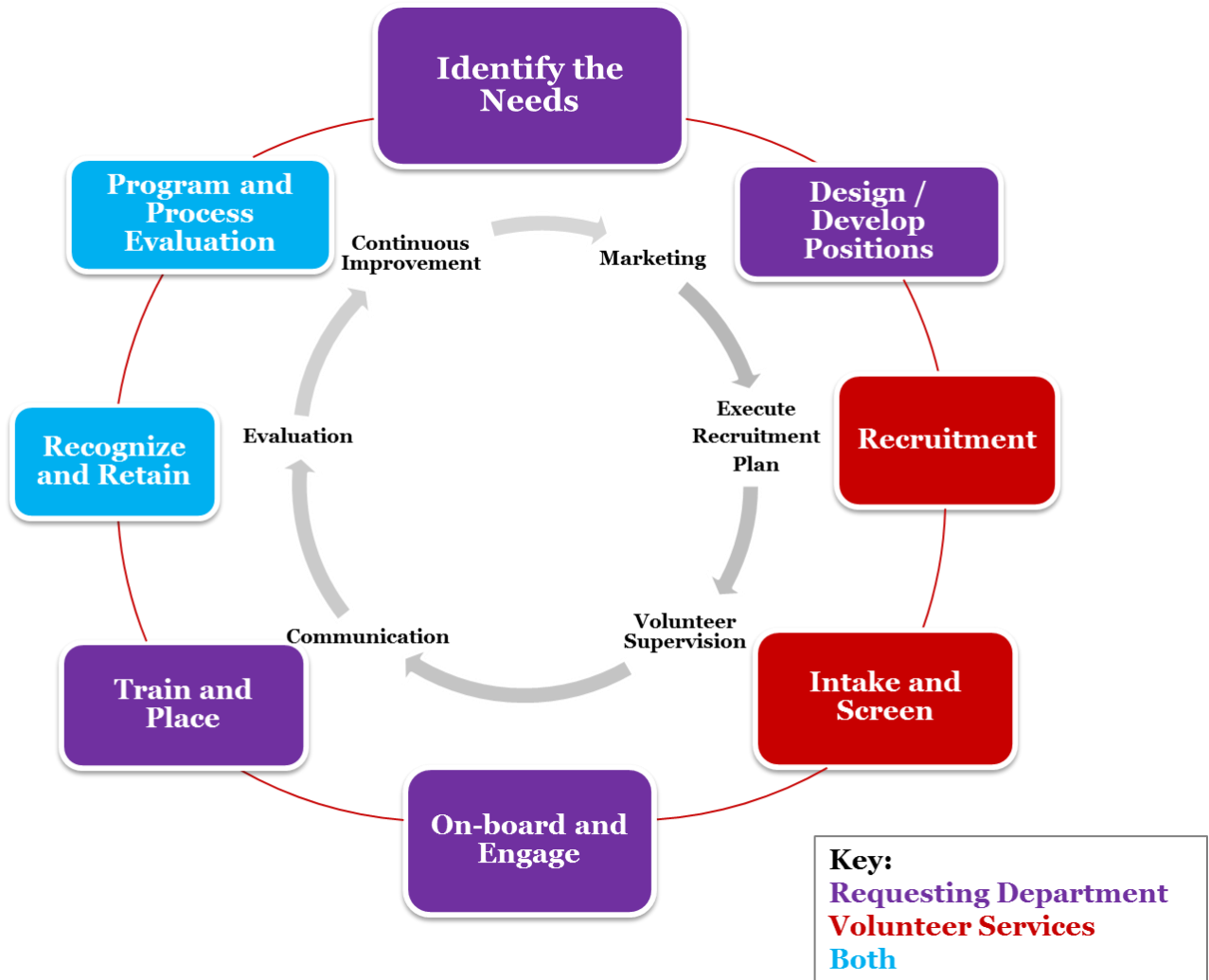




## Volunteer Engagement Cycle Graphic and Narrative



The **Volunteer Engagement Cycle** outlines the required activities to manage a robust, coordinated and effective volunteer engagement process. The activities are interdependent– the outside circle focuses on the standard phases of the cycle and the inner circle presents the ongoing activities that support the success of the cycle.

### Identify the Needs

The cycle begins with identifying the needs of the organization, local chapter, and line of service or unit. This first phase requires reviewing the organizational goals, identifying how volunteers can best support meeting those goals. This process will uncover the many ways volunteers could fill and will also help identify the required prerequisites for each position. It is important not to limit your thinking when visioning potential volunteer roles.

There is no task that a volunteer can't do. You simply need to ensure that you have the right person who meets all the position requirements such as skills, abilities, education, expertise, licenses, training, etc.

- **Who does this?** The requesting department works with Regional Volunteer Service Officers to complete the annual Volunteer Needs Assessment, and NHQ Volunteer Services and Regional Volunteer Services provide expertise, technical advice, resources and tools for the needs assessment process. Regional Executives work with the Regional Volunteer Service Officers to aggregate Needs Assessment results. Based on these results, the regional leadership team works to establish the recruitment goals for the fiscal year that are approved by the Division Vice President. Needs Assessment results are also shared with the Division Vice Presidents. While this annual process establishes goals and a baseline for volunteer recruitment, The Volunteer Needs Assessment should be an ongoing process throughout the year whereby the requesting department adjusts their posted volunteer positions in Volunteer Connection.

## Develop Positions.

Once needs and volunteer roles have been identified, the requesting department develops standard position descriptions for each position using the [standardized position description](#). It is important to proactively identify potential barriers to filling the position and work to craft a position that minimizes those barriers. For example, if the role you are recruiting for requires 30 hours a week and finding volunteers for that position has historically been difficult, it might be wise to recruit more volunteers to fill the position and decrease the required number of hours per volunteer.

- During this phase it is critical to develop a plan for oversight and ongoing engagement of volunteers. Determine the appropriate volunteer or team of volunteers responsible for scheduling, onboarding, training, communicating, supervising, recognizing and evaluating the volunteer. In many cases the volunteer supervisor will be responsible for fulfilling all of these roles. The volunteer supervisor could be a volunteer or a paid staff but must be housed in the requesting department.

The volunteer supervisor should be trained in basic volunteer engagement and should be individuals that are excited about their role. A motivated volunteer supervisor will promote a meaningful volunteer experience. It is important to ask the following questions:

- ✓ What is the plan for ensuring the volunteer supervisor understands their roles and how will they receive the appropriate training to effectively support the volunteer?
- ✓ Are there areas of the engagement cycle that can be centralized like scheduling, onboarding, or training where a volunteer could be recruited to serve a specific function for a group of volunteers?
- ✓ Is the supervising manager excited about the opportunity to engage and support volunteers? What barriers will you need to overcome to ensure they are actively creating a culture of volunteer engagement?

At this stage it is also important to think about where you will need to develop volunteer leader positions who can serve as volunteer supervisors for a group of volunteers. By leveraging volunteers in the role of supervisor, you can expand the capacity of your team. Volunteer leaders filling this role should also receive basic volunteer engagement training.

- **Who does this?** The requesting department creates the positions, and NHQ Volunteer Services as well as Regional Volunteer Service Officers serve as a resource for standard position description templates, training, technical assistance, and best practice sharing.

## Recruitment

A recruitment plan provides the strategy for recruitment execution. Recruitment includes determining a target audience, developing the marketing/communications materials, conducting outreach and identifying the best person for the position.

- **Who does this?** Regional Volunteer Service Officers are responsible for developing a targeted recruitment plan and for regional recruitment activities working in partnership with the chapter executives and the community volunteer leader. Through this process Volunteer Services is responsible for providing the requesting departments with qualified candidates for positions.

## Intake and Screen

Intake and screening begins with the application process in Volunteer Connection. This is the first touch point for an individual interested in volunteering with the Red Cross. The Volunteer Intake Processing Center (VIPC) ensures the volunteer completes the intake process which includes an introduction to The Volunteer Handbook and signing all appropriate documentation such as intellectual property agreement and media release, a basic orientation (short video orienting the volunteer to the organization's mission, vision, values and lines of business), and initiating the background check. Regional Volunteer Services ensures the background check is cleared and conducts the first level of screening by connecting with the individual to inquire about the volunteer's interests and ensure they meet the organizational and position requirements and runs a license check (if required for position). Once these required steps are completed, Regional Volunteer Services refers the prospective volunteer to the requesting department to conduct the second layer of screening which includes a face to face interview to determine if the candidate is an appropriate fit for the department and position. Prospective volunteers also are invited to attend in-person "Get Connected" or local orientation, if available, for further assessment of prospective volunteers and to promote connection.

- **Who does this?** The VIPC is responsible for ensuring the volunteer completes the required initial intake steps. Regional Volunteer Services is responsible for screening and initial phone screening of the volunteer. The requesting department is responsible for position-specific interviewing, and approving the volunteer or referring the volunteer back to Volunteer Services.

## On-board and Engage

Onboarding and engagement begins when the Requesting Department approves the volunteer. The Requesting Department welcomes and orients the volunteer to the department and formally introduces the volunteer to their new role, helps the volunteer acclimate to department policies and procedures, and assists with navigating the required training. This departmental orientation process should introduce the volunteer to how the department supports meeting the American Red Cross mission as well as to appropriate systems and/or structures, and the social community of the team. The departmental orientation will cover a range of items from reviewing the table of organization for the team, to how to log onto the computer and where to find the bathrooms and water cooler.

- **Who does this?** The requesting department welcomes the new volunteer to the department and discusses assignment expectations. Regional and Volunteer Services are available resources if support in this process is required.

## Train and Place

Training and placing the volunteer is the second most critical step in engagement as it is the beginning of an ongoing and meaningful relationship with American Red Cross. The volunteer supervisor reviews the specific role assigned, sets clear expectations around the goals and objectives for the position, reviews the time commitment, the day-to-day support structure of the department, and schedules the required training for the position. The volunteer supervisor will connect the volunteer with individuals that they will be working with on a day-to-day basis and will work with the volunteer to ensure they have all the resources, tools, training, and equipment required to fill the role. This step is highly critical to the success of the volunteer in their position. It is important that the volunteer feels comfortable with filling their role and that the volunteer supervisor equips the volunteer with the knowledge and skills required for the position.

- **Who does this?** The Requesting Department welcomes and introduces the new volunteer to the department and assignment expectations. Regional and NHQ services departments are available resources if support in this process is required.

## Recognize and Retain

Recognition includes day-to-day interaction with the volunteer as well as the formal events that recognize the volunteer. Considerations for this phase include: How the volunteer supervisor will support the new volunteer in successfully accomplishing the work identified for their role; How the volunteer supervisor will provide instruction and preparation for assignments, as well as conduct follow-up; How a volunteer supervisor acknowledges successes and/or concerns related to assignments and performance in a positive and constructive way; How the

supervisor advises the volunteer about assignment or leadership opportunities that might be available. Recognition is rooted in the cultivation of a positive working relationship. Everyone likes to be recognized differently and the volunteer supervisor should work with the volunteer to explore their preferred type of recognition. Retention is directly tied to the volunteer experience at every stage in the volunteer engagement cycle to include ongoing supervision. At this stage, the volunteer supervisor should be continuing to communicate clear expectations, provide ongoing and direct feedback, and support, tools as well as managing difficult situations as they arise.

- **Who does this?** The requesting department and Volunteer Services work collaboratively so the volunteer experience is positive.

### **Program and Process Evaluation**

The evaluation stage is holistic in that it is comprised of both the volunteer's performance in the assigned role as well as the volunteer experience with each step in the volunteer engagement cycle. For example, did the volunteer meet the performance goals set out in the position description and associated work plans? Was the measure of success clearly defined? Was the volunteer position clear, was there ongoing engagement throughout the process, and was the training and placement process sufficient? This phase also allows the volunteer supervisor to gather data and feedback to improve results of the volunteer position and the volunteer experience. Areas of exploration include but are not limited to the managing of ongoing quality assurance, addressing volunteer concerns, issues or complaints, assessing gaps in the engagement cycle and tracking the goals of the position in relation to the original needs assessment and position description.

- **Who does this?** The requesting department and Regional Volunteer Service Officers work collaboratively to review and measure performance.

The **Inner Circle** represents the activities that take place in conjunction with Outer Circle phases of the Volunteer Engagement Cycle. **Marketing** is important to promote opportunities and support recruitment. Once the **Recruitment Plan** is developed, it is important that everyone understands the plan and how it will be executed. Volunteer Supervision is the ongoing communication, interaction and support provided to the volunteer which directly impacts the volunteer experience. Clear and ongoing **Communication**, both with the volunteer regarding the department, the position and ongoing expectations and changes, is essential to the volunteer's success and achieving the department's goals through the volunteer engagement program. **Evaluation** of the engagement cycle and the volunteer both formally and informally helps to assess what is working and what is not. **Continuous Improvement** is a result of open communication and collaboration within Volunteer Services and the Departments engaging volunteers.