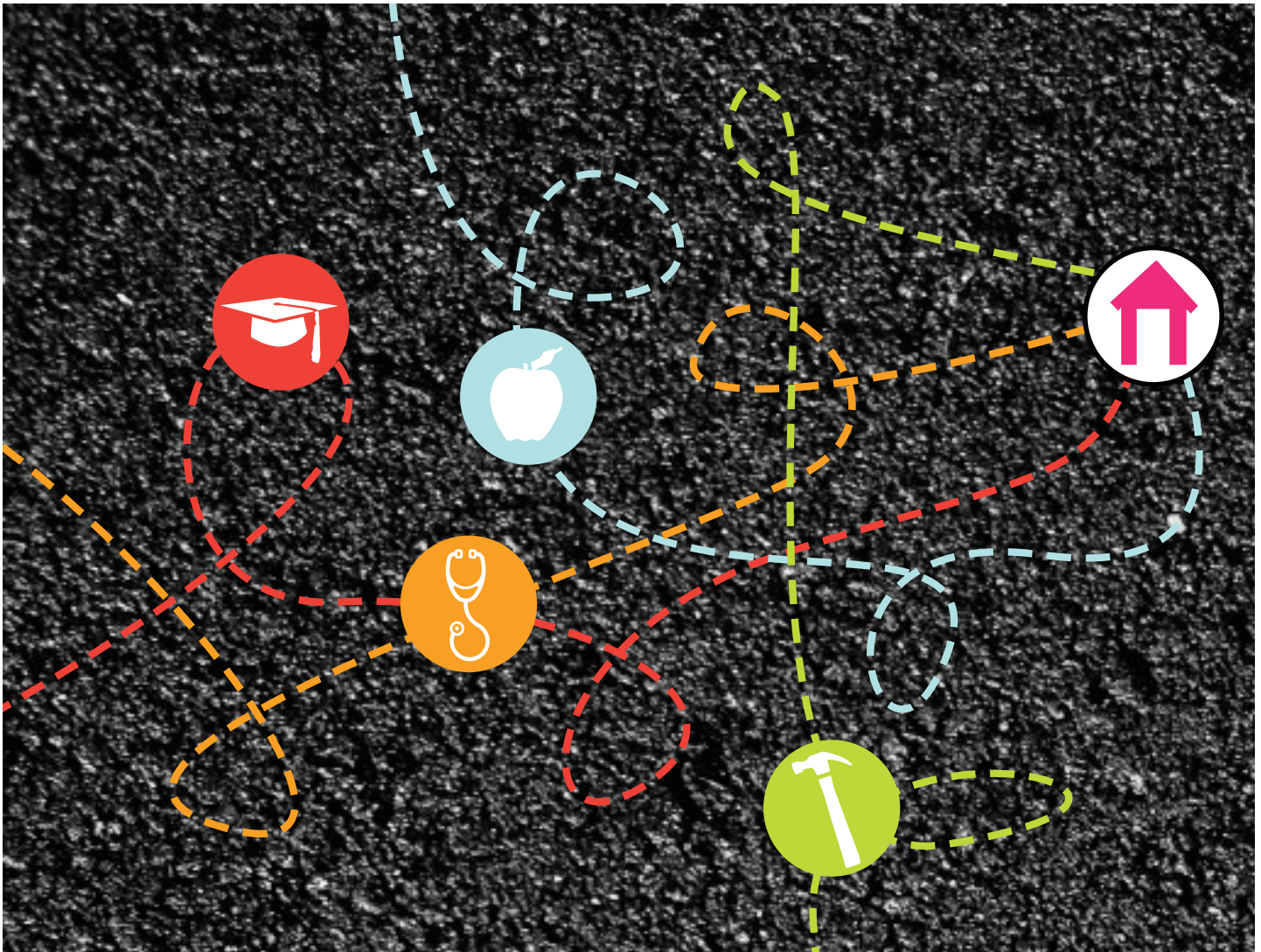


## The Tracks of My Volunteers

Improve your program by getting to know your people

BY HILARY ANNE HAGER



**We live in the Information Age**, but sometimes it seems like the flood of information simply leaves us overwhelmed. For shelter volunteer programs trying to keep their heads above water, figuring out which information to track is just as critical as figuring out how to track it.

Gathering and maintaining information about your volunteers is important on many levels. You need the small details—which volunteers are providing service at which times, for example—but you also need the

larger perspective on what type of community support your organization has, as measured by volunteer time and effort.

Regardless of whether they give a financial gift in addition to their time, volunteers are donors, and they deserve the same kind of care and maintenance as your financial donors. You need to have an understanding of who they are and how they're connected in your community. Gathering more information about your volunteers is a matter of resource mapping, which leads to a better

understanding of what skills and abilities your organization has at its disposal.

Shelters need systems to track information related to their volunteer programs, and the system needs to be accessible to the pertinent shelter officials—it can't just "live" inside of the head of the program manager.

Volunteer programs are information- and time-intensive, and involve a lot of details that need to be tracked. Volunteer managers are usually so busy they either can't take time to develop the tracking systems they need,

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or don't take the time to put onto paper what they know in their heads. If that critical person leaves the organization, this can lead to burnout and staff turnover; without a clear set of instructions on the program's different elements, the systems won't transfer to new hires, and the institutional knowledge and details will be lost with the former employee.

It's also important to track *why* volunteers leave. When someone stops volunteering, you should contact them to find out why, and then observe any patterns that may help you improve your program and retain your volunteers.

At my organization, I've developed a "What to do if Hilary is hit by a bus" manual. (Others prefer to call it the "What to do if Hilary wins the lottery" guide, but let's be serious about which is more likely to occur.) This manual outlines all of the elements of my job, including system passwords, what tasks need to be done at which point in the month, instructions on data entry, scheduling, running reports, giving orientations and trainings ... the whole nine yards.

This may seem obsessive, but it has value: For one thing, it means I can actually take a vacation and have someone step in to do my job while I'm away. It also means that if I ever leave, the next person hired can step in and carry on until they figure out a new and better way to do things. Believe me when I tell you that taking the time to get this set up and structured now will save you more time than you can imagine later on.

### Shall We Gather?

Before we talk about tracking information, let's identify what information to gather. For me, a guiding principle is to ask only for the information that I'll actually use; otherwise, it's unnecessary. That said, though, I like to think big: I may not need certain information right this second, but if I think it could come in handy later, I start collecting it so I'll have it when I need it.

You'll want to have a schedule for keeping information up to date; information is only useful if it's current. Consider sending out an annual reminder to ask people to update their information; some people simply don't think of telling their volunteer manager when they move or their emergency contact changes, as it may in the case of a death or divorce.

### General Contact Information

This one is obvious—organizations need to communicate with their volunteers, so gathering mailing addresses, phone numbers, and e-mail addresses just makes sense.

Keeping track of where volunteers live can also be useful; if they live nearby, perhaps they can help out during inclement weather? Knowing where they live can also help you figure out where to hold a big event, or to develop a recruitment strategy; if volunteers aren't coming from the areas closest to the organization, some local outreach might be in order.

Knowing where they come from can also help an organization that's developing relationships with government agencies or lobbying for passage of animal-friendly laws. Having volunteers as constituents in different communities, and knowing who and where they are, means having allies on the ground.

### Date of Birth

Many volunteer programs have minimum age requirements. If that's the case, volunteers' date of birth is a must. Another benefit of knowing birthdates is being able to acknowledge a volunteer's special day with a card or e-greeting—an easy and inexpensive way to make volunteers feel as though they're a part of a community.

### Emergency Contact Information

Nearly every volunteer application I've seen asks for an emergency contact, which is a solid practice. It's important to ensure that information is accessible: In the case of a serious emergency, can someone get to it quickly? A Web-based database allows users to access the information from outside of the building, which is ideal. A low-tech option is having a binder containing emergency contacts; this can be kept with all other emergency preparedness items. Make the information as accessible as possible so it can be utilized if it's ever needed.

Keeping a binder requires periodic updating to remove the forms from former volunteers and add new ones from recent additions.

### Employer

It's a good idea to find out where your volunteers work, because they can serve as a bridge and create a connection in the



community. Some companies make matching donations for employees who volunteer a certain number of hours, or match donations of monetary gifts. Some employees have no idea their company offers the benefit, so it's nice for development staff to be able to make those connections.

Employment information can also be helpful when your shelter is looking for event sponsorships or donations of supplies, equipment, or other items. Companies may find requests made by employees more appealing.

### Personnel Files

An effectively managed volunteer program should look and act a lot like an effective human resources department. Volunteers should have personnel files just like employees (a paper filing system with folders for each volunteer is a great place to start).

The file should include all of the relevant documentation for the individual, including their volunteer application, signed volunteer agreement, any training documents signed by the volunteer to indicate they've read and understood the training content, evaluations of the volunteer and their service, correspondence to or from the volunteer, paperwork about any corrective or disciplinary action taken, notations of any awards the volunteer has received, and so on.

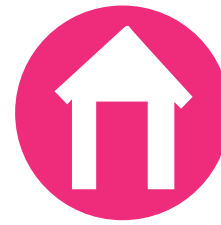
This information comes in handy in a couple of ways; it's there to create a record if a volunteer ever needs to be let go, if a special award is to be given, or if the volunteer needs proof of service for community service requirements.

It also ties to what I mentioned earlier—such records ensure that the history of the person's relationship with the organization is accessible, and exists somewhere outside of the volunteer manager's head. If the volunteer leaves but later decides to return, the record of their involvement—good and bad—will be available and easy for any new managers to review.

Each organization will need a plan for how long to maintain these files after a volunteer departs, but three to five years is usually a good rule of thumb.

### School

If your organization allows teenage volunteers, finding out which schools they



attend can also help you make connections in the community. You can make a presentation at the school to talk about volunteer opportunities, or have the school become a site for senior service-learning projects, etc.

Students in technical schools, community colleges, or universities may help your organization access people with specific skills, such as groomers, photographers, marketing and promotion professionals, video producers, copy editors, statistical analysts, fundraisers, and more.

### Background Checks

Some organizations require background checks for volunteers participating in their program; that's the case at my shelter now. We have established guidelines for which types of offenses our volunteer program considers acceptable, and which types prevent participation.

### Hidden Talents

Volunteers bring with them a wide range of skills, hobbies, and abilities that might benefit your organization in ways beyond the direct animal care or in-home foster care they provide. It may not even occur to them that their skills can be helpful, so it behooves any organization to ask questions and find out what makes their volunteers tick.

Ask volunteers if they belong to a service club or speaker's bureau, or if they have any additional skills or hobbies that you should know about. People with construction or mechanical abilities, sewing, knitting, or designing skills, or who are members of Toastmasters, can all be huge assets to any organization—but only if you know about them!

### Schedules

Groups that rely on a consistent number of people to do a set amount of work at a particular time need to establish a schedule in order to know who is going to be there and what type of work they'll be doing.

One of the goals of my volunteer program is to have consistent and high-quality care for the animals in my shelter. Predictability is critical; I have a schedule with a set number of volunteers due to come in at particular times. Volunteers make a commitment to work a certain shift every week for a minimum of three months, and if they're not able to make it, they have to try to line up a substitute to cover for them.

In other organizations, the setup allows more flexibility for volunteers to come in when they can, or to fulfill a certain number of hours in a 30-, 60-, or 90-day period. Or volunteers sign up to participate in one event at a time. A variety of models can work, but

## [volunteer management]

### Resources

Go to [animalsheltering.org/volunteer\\_databases](http://animalsheltering.org/volunteer_databases) for information about choosing the volunteer management database that best fits your shelter's needs.

Go to [animalsheltering.org/volunteer\\_application](http://animalsheltering.org/volunteer_application) for information about how to structure a volunteer application.

in my program, the need for consistency and predictability requires a set schedule.

Regardless of what your scheduling needs are, each organization needs to identify a process for identifying its volunteer needs and allowing people to sign up and carry out their service. Whether the system utilizes spreadsheets or paper sign-up sheets, online scheduling programs or appointment calendars, the important thing is that the process exists, the steps of the system

are outlined, and the tool is accessible to volunteers as well as other organization staff so they know where to go for assistance at any given time.

### Service

This is the nuts and bolts of tracking: How many hours has the volunteer served? How many animals has the foster home taken into care? When did the person start volunteering, and when did they stop? Has the volunteer fulfilled her weekly/monthly/annual commitment?

For many programs, knowing how many volunteers have performed how many hours of service is a metric for measuring success. Volunteer involvement can be a measurement of community support. Independent Sector, a national coalition of charitable organizations, calculates the value of volunteer service at more than \$20/hour.


Volunteers may also need to know the extent of their service, whether they're calculating tax-deductible transport trips or

the hours required to complete a community service project.

Knowing when a volunteer began serving allows managers to send cards to acknowledge significant milestones, such as completion of an initial commitment period, or a six-month or one-year anniversary. Start dates can also be used to track probationary periods or prompt an evaluation if one is required after a certain amount of time is completed.

Some groups use paper sign-in systems, or e-mail hours report forms to their volunteers to fill out and return. All of these do the job, but entering the data can be very time-consuming, and these systems don't inform the program coordinator until well after the fact if volunteers haven't met their time requirements or shown up at their scheduled time.

Other organizations use Web-based systems that allow volunteers to sign in using a time-clock function, or remotely with a timesheet that automatically tracks hours and does all the math.

Managing a volunteer program is much more complex than simply lining up a person to do a specific task at a specific time. Managing the appropriate data in a useful way can sometimes feel less imperative than making sure the organization's core mission is met, but investing time in setting up the right systems to collect the information that best serves the needs of the organization and the volunteers will absolutely save time and effort down the road. 



Hilary Anne Hager is the shelter activities coordinator for Everett Animal Services in Everett, Wash.



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