

## **Utilizing & Managing Volunteers**

When it comes to the utilization of volunteers, we assume the volunteer has completed the application and screening process. To insure a good fit within UNHCE and the volunteer program, the volunteer supervisor needs to know as much as possible about the volunteer. Working with volunteers is about carefully placing volunteers in positions, delegating authority to volunteers, understanding the different types of volunteers and knowing what makes each unique. This section covers the following:

- Placement of volunteers
- Delegation
- On-going Support & Communication
- Volunteers as Middle Managers
- Policies and Procedures related to the day-to-day management of volunteers

### **Utilization of Volunteers**

This is the actual “putting volunteers to work” phase. In this part of the I.S.O.T.U.R.E. model, supervisors should consider how they make volunteers feel, how they are treated, and what kind of tasks are delegated to volunteers. Utilization entails placement - ensuring the right person is in the right position with the right preparation. It also involves delegation - providing authority and guidance without doing the job for the volunteer. Finally, ongoing communication is critical to support volunteers. Volunteers require regular training, an ongoing system of two-way communication between the volunteer and supervisor, and made aware of their progress.

Utilization of volunteers means providing opportunities for volunteers to use acquired knowledge and skills appropriately for the overall growth and success of the organization. Volunteers have different roles in UNHCE, however, they should always be working within the guidelines of their service description. Volunteers perform specific tasks and projects, outlined by the UNHCE volunteer supervisor. For example, Master Gardener volunteers answer questions via the Family Home and Garden Education Center’s telephone hotline. Volunteers are also engaged in more independent efforts such as Community Tree Stewards, who work to protect land in their communities. In this latter case, placement and delegation is often done by the volunteer themselves, as they create a volunteer action plan and pursue their own projects. For these volunteers, support and communication are especially critical, since their remote projects can mean a more isolated environment.

### **Placement of Volunteers**

By the time a volunteer gets to this phase they should have a feel for the position they are volunteering for, responsibilities of the position, how they will work in the organization, and training and supervision they can count on. Every effort should be made to match the skills and interests identified during the screening process and the duties needed to be performed. This effort will pay off in the quality of the tasks performed and the volunteer’s level of satisfaction.

Proper placement helps in the retention of volunteers. It is important at this point to get the volunteer into his/her role as quickly as possible. Sometimes, even with appropriate support and training, the first placement may not be the best match. Be flexible enough to try the volunteer in other position that may be a better fit. Not every potential volunteer may be suited for your program—in any capacity. No matter how much a volunteer is needed, if it is not a good match, it is better to wait a bit longer than to invest time and energy in a volunteer who isn't a good fit for the program.

## **Delegation**

This is the enabling and empowering stage of volunteer development and management. The definition of delegation is “the empowering of one person to act for another,” which enables volunteers to do their work. This involves being able to motivate others. Delegation involves clarifying the goal or identifying what success should look like when a task has been delegated. Effective delegation includes the following steps:

- Define the assignment in terms of results, not the means of achieving it,
- Determine the level of control, in other words how much authority the volunteer has in carrying out the responsibility,
- Communicate guidelines relevant to policies, laws, or values the volunteer needs to work within,
- Provide resources to make the volunteer's role easier and most likely to succeed, and
- Establish the criteria for success, how their work will be judged.

The volunteer should be involved in determining the criteria, and established check points so the volunteer and supervisor can monitor how well things are going. The key is to be a manager of volunteers by being an enabler of others. When delegation is successful, all members in the group are involved in activities.

## **Ongoing Support, Follow-up, and Communication**

Once a volunteer is placed in a position, ongoing communication is essential. Checking in with (not checking up on) volunteers regularly gives staff the opportunity to assess if more knowledge or tools are needed, and how they are feeling about their role. Ongoing support, follow-up and communication are essential pieces of the utilization stage. Since volunteers will often continue what they are doing without asking questions unless specifically asked, staff needs to reach out to help volunteers assess their needs.

Volunteers and staff are considered partners in implementing the mission and programs of UNHCE. It is essential to this relationship that each partner understands and respects the needs, abilities, and responsibilities of the other. Communication needs to be two-way, ongoing and regular, and should come in different forms: phone, written, face-to-face, electronic, etc. Finally, volunteers should be consulted regarding all decisions that would substantially affect the performance of their duties.

## Knowing Who to Ask

The most basic and important part of communication with a volunteer is making sure they know who to talk to. Each Extension volunteer must have a clearly identified supervisor responsible for day-to-day guidance of the work of the volunteer, and available to the volunteer for consultation and assistance. This is particularly important when a volunteer is in a position where people other than the supervisor may ask the volunteer to do a job.

## Volunteer Middle Management

Volunteer middle management provides a system for paid staff to delegate responsibility to key volunteers, such that a volunteer may act as a supervisor of other volunteers. The middle management volunteer works between the salaried staff and volunteers who conduct ongoing programs. Volunteer middle management is as much an attitude as it is a concept or program. It allows the organization to involve more volunteers in positions of added responsibility. Volunteers make excellent mid-level supervisors of other volunteers. Utilizing their skills can encourage a team approach. Engaging them in supervisory roles is also a way to promote and recognize experienced volunteers. Other advantages of middle management volunteers include:

- More work can be accomplished when responsibilities are delegated to volunteers
- Staff use their expertise and time more effectively
- Volunteers have an additional opportunity for growth and development
- Additional people create more ideas.

There are three types of middle management volunteers:

- **Key volunteers** – serve as experts in a particular subject matter area, or with specific events or activities (for example, an alumni Community Tree Steward who gives a talk to new trainees about his experience as a UNHCE volunteer)
- **Master volunteers** – teach/convey subject matter to others (for example, Master Gardeners or Marine Docents)
- **Committee members** – assist professional staff in planning, implementing and evaluation of programs (for example, County Extension Advisory Councils, or any program area advisory committee).

## Considerations for a Successful Middle Management System

Working with key middle manager volunteers (MMV) takes considerable time. Responsibility may be delegated to them, but the volunteer supervisor (UNHCE staff person) is ultimately responsible for the program and what happens in it. The following should also be considered:

- A middle management volunteer system may require staff to give up some control in order to delegate tasks to volunteer middle managers more effectively.
- Additional training may need to be provided for both staff and middle management volunteers in areas of delegation and supervision.

- When a middle management system is implemented, it is important that current advisory councils and volunteers fully understand the scope and roles related to the middle management system and how it can positively impact their volunteer program.

### **Characteristics of Successful Middle Management Volunteers**

- Middle managers understand the philosophy and guidelines of UNHCE.
- Middle managers have a sincere interest in working with other volunteers and professional staff in an educational setting.
- Middle managers will implement programs following the design and evaluation guidelines as defended by their supervisor.
- Middle managers demonstrate commitment, initiative, self-confidence, and self-reliance. They understand their position in the organization and the limits and scope of their responsibilities.
- Middle managers carry more responsibility than other volunteers and therefore have more contact with the staff and the office. They support and enhance work done by the staff. They are part of the team and interactions with the support and program staff are done in a respectful manner with full understanding of the policies related to access to office equipment, supplies, and support staff.
- Middle managers work with the staff to appropriately recruit, train and recognize other volunteers they work with.

### **Day-to-Day Management of Volunteers – Policies and Procedures**

Through years of experience in UNHCE Volunteer Development, the following reflects best practices and University Policy related to the utilization of volunteers in all UNHCE program areas.

### **Representing UNH Cooperative Extension**

Prior to any action or statement that might significantly affect or obligate Extension, volunteers shall seek prior consultation and approval from appropriate staff including their supervisor. These actions may include but are not limited to public statements to the press, coalition or lobbying efforts with other organizations, or any agreements involving financial or contractual obligations. Volunteers are authorized to act as representatives for Extension as specifically indicated within their volunteer service descriptions.

Volunteers and staff have an obligation to act in a way that is neither reckless nor wanton. As Extension representatives they have the obligation to provide accurate and timely information. Only current resources, selected for use by UNH Cooperative Extension, should be used in programs and with clientele.

## **Public Image**

As representatives of UNHCE, volunteers, like staff members, are responsible for presenting a good image to clients and to the community. This includes dressing and acting appropriately for the conditions and the performance of the volunteer duties. Nametags should be worn when the volunteer is working for Cooperative Extension; this makes it clear to program participants that the volunteer is representing UNH Cooperative Extension. This issue becomes particularly relevant when a volunteer acts as a political advocate (for example, testifying on an agricultural issue in the NH legislature) – in this case, volunteers need to know they must separate their own political advocacy (private role) from their role as a UNHCE volunteer (public role), and not wear their UNHCE nametag.

## **Confidentiality**

Paid and volunteer staffs are responsible for maintaining the confidentiality of all proprietary or privileged information to which they are exposed while serving in their respective role, whether this information involves a single staff member, volunteer, client, or other person, or involves overall Extension business.

## **Political Activities**

In a spirit consistent with University System of NH Policy USY.V.D.9.1.1 (see <http://usnholpm.unh.edu/USY/V.Pers/D.9.htm>), volunteers are strongly discouraged from actively conveying partisan opinions (e.g. voting a particular way in an election; supporting a particular candidate) while performing their role as an UNHCE volunteer. Volunteers should endeavor to minimize the risk or perception that Extension is associated with or endorses the “platform” of a particular political party.

## **Program Eligibility and Non-discrimination**

Volunteers helping to plan and publicize programs need to be particularly familiar with UNHCE’s affirmative action statements, located on our website at ([http://extension.unh.edu/resources/files/Resource000676\\_Rep698.pdf](http://extension.unh.edu/resources/files/Resource000676_Rep698.pdf) ). Please also see UNHCE’s Civil Rights website, <http://extension.unh.edu/Intranet/UNHCECR.htm> for more information.

## **Harassment & Discrimination**

Harassment and discrimination are against the University of New Hampshire policy (<http://usnholpm.unh.edu/UNH/V.Pers/B.htm>). This includes harassment or discrimination on the basis of race, color, religion, sex, national origin, age, veteran’s status, gender identity or

expression, sexual orientation, marital status, or disability in admission or access to, or treatment or employment in, UNHCE programs, services, or activities.

Volunteers and staff must avoid any verbal, written, graphic or physical conduct which might bring emotional, psychological, or physical harm, or explicitly degrade any individual.

### **Liability Coverage – Paid and Volunteer Staff**

UNH Cooperative Extension paid and volunteer staff who are acting within their position responsibilities are covered by the university system's comprehensive general liability insurance policy, and are subject to the exclusions provided therein, including the exclusion for injuries resulting from the use of automobiles. Volunteers are named additional insured under the policy. They receive defense and indemnification up to the limits of the policy. (Volunteers are encouraged to consult with their own insurance agents regarding the extension of their personal insurance to include community volunteer work.)

### **Insurance and Workers' Compensation**

Volunteers, while engaged in Extension business, are covered by the university system's comprehensive general liability insurance policy, and they are subject to the exclusions provided therein, including the exclusion for injuries resulting from the use of automobiles. Staff members should carry a copy of the USNH Certificate of Liability Insurance in all situations where volunteers or staff may be at risk (e.g. field trips, etc.). This certificate is updated every November 1<sup>st</sup> and is available to UNHCE staff in our publications repository under Intranet-Policies.

### **Requests for "Additional Insured" Certificates**

In some situations, partnering agencies or volunteer groups, such as schools, public places and other venues for special events who collaborate on UNHCE events require (or request) insurance coverage through UNHCE. If this is required, the UNHCE educator or staff responsible for the event should request a Certificate of Liability Insurance naming the partnering agency or venue as an Additional Insured with respect to Commercial General Liability (CGL). To request an "Additional Insured" certificate, go to the following website for the form and follow instructions: <http://extension.unh.edu/Intranet/UNHCEPP.htm>. NOTE: This is only to be requested if the partnering agency or venue requests/requires it. Otherwise, a copy of the general USNH Certificate of Liability Insurance is adequate proof of insurance liability coverage.

Volunteers should be encouraged to consult with their own insurance agents regarding the extension of their personal insurance to include community volunteer work.

***NOTE: Volunteers are not covered by Workers' Compensation Insurance.***

### **UNHCE Transportation Policy**

Please see: [http://extension.unh.edu/resources/files/Resource001037\\_Rep1193.pdf](http://extension.unh.edu/resources/files/Resource001037_Rep1193.pdf)

### **Activity Driver Form**

Please see: [http://extension.unh.edu/resources/files/Resource001032\\_Rep1184.doc](http://extension.unh.edu/resources/files/Resource001032_Rep1184.doc)

### **Conflict of Interest**

Volunteers are expected to act at all times in the best interest of UNH Cooperative Extension and to exercise sound judgment unclouded by personal interests or divided loyalties. When performing duties for UNH Cooperative Extension and in outside activities, volunteers need to avoid the appearance as well as the reality of a conflict of interest. A conflict of interest exists if a circumstance would lead a reasonable person to question whether one's motivations are aligned with UNH Cooperative Extension's best interest. See USNH policy <http://usnholpm.unh.edu/USY/V.Pers/D.7.htm>.

The public views UNH Cooperative Extension staff and volunteers as educators who represent the outreach component of the land grant university. Cooperative Extension systems should avoid situations that question its public trust and those that create a conflict of interest. Volunteers may be involved in University activities in which there might be a conflict of interest with their personal business. If there appears to be a possibility for a conflict of interest, the volunteer should discuss the matter with the volunteer supervisor and if the volunteer supervisor determines that a conflict exists, the volunteer should not participate in the activity. The nature of Extension work is such that it requires considerable direct public contact and Extension volunteers are generally viewed as an outreach educational component of the institution. Based on this role, it is crucial that Extension volunteers be particularly sensitive to potential conflicts of interest.

### **Non-Profit Boards**

A non-profit board has specific legal duties of care, loyalty, and obedience. UNH Cooperative Extension is a nonprofit educational institution of higher education and follows all non profit guidelines.

#### Duty of Loyalty

This requires that the member place the organizational interests above self interest and to make decisions objectively with out the influence of their own potential individual gains.

#### Duty of Care

This requires that the member be reasonably informed, participate in decisions, and act in good faith as with the care of an ordinarily prudent person in similar circumstances. Members are required to participate actively in decisions, attend meetings, use independent judgment and seek reliable information in order to make informed decisions.

### Duty of Obedience

This requires that the board act in accordance with the non profits mission and all applicable laws and regulations.

Conflict of interest on boards is regulated by statute in the State of New Hampshire. The New Hampshire Charitable Trust and voluntary corporations statute RSA:7:19 and RSA Chapter 292 regulate conflicts of interest situations related to non profit organizations (see <http://gencourt.state.nh.us/rsa/html/I/7/7-19.htm>). The statutory requirement requires every charitable organization to adopt a conflict of interest policy as of August 10, 1996. The State of New Hampshire has specific rules for nonprofit boards. See <http://doj.nh.gov/publications/guidebook.html> for complete guidelines.

### **Reimbursement of Volunteer Expenses & Access to UNHCE Materials**

Volunteers may be eligible for reimbursement of reasonable expenses incurred while undertaking business for Extension. Prior approval must be obtained for any expenditure. The Reimbursement Form found on our Business Services Center (BSC) website should be used (see <http://extension.unh.edu/Intranet/UNHCEBSC/reim2.pdf>.) You must have original receipts, state the purpose of the expense and list when the event was held and who attended. This is not for travel related expenses.

For travel expenses such as mileage, hotel and meals, you must use the Travel Voucher form (see BSC website. <http://extension.unh.edu/Intranet/UNHCEBSC/UNHCEBSC.htm>.)

When appropriate, volunteers may have access to UNHCE property and materials necessary to fulfill their duties, and shall receive training in the operation of any equipment (based on county/program area policy). Property and materials shall be utilized only when directly required for Extension purposes (see <http://usnholpm.unh.edu/UNH/VI.Prop/F.htm#5>.)

### **Short Term Volunteers**

Some UNHCE volunteer programs and projects make active use of one-time volunteers, such as helping at an Extension-sponsored event. Asking the one-time volunteer to sign a form acknowledging his/her role as a volunteer (for X event, on this date, time in and time out etc.) helps do two things: the volunteer recognizes it is a formalized role (they are not there just to “hang out”), and it fulfills UNHCE’s responsibility to comply with New Hampshire’s Volunteer Immunity Law (see <http://www.gencourt.state.nh.us/rsa/html/LII/508/508-17.htm>).

See Short Term Volunteer Form:

[http://extension.unh.edu/resources/files/Resource001190\\_Rep1513.pdf](http://extension.unh.edu/resources/files/Resource001190_Rep1513.pdf)

or Short Term Volunteer Sample Sign-in Sheet:

[http://extension.unh.edu/resources/files/Resource001178\\_Rep1496.pdf](http://extension.unh.edu/resources/files/Resource001178_Rep1496.pdf)

## **Virtual Volunteering**

Virtual volunteering allows anyone to contribute time and expertise to not-for-profits organizations, schools, government offices and other agencies that utilize volunteer services from one's home or office site location. Virtual volunteering means a volunteer's tasks are completed, in whole or in part, via the internet and a home computer. Generally these volunteers fall into one of two categories depending on the work they do: technical assistance or direct contact volunteers.

Virtual volunteering is also known as online volunteering, cyberservice, online mentoring, teletutoring and various other names. Virtual volunteers allow an agency to expand the benefits of their volunteer programs, by allowing more volunteers to participate, and by utilizing volunteers in new areas. Many volunteers actively search for volunteer opportunities they can complete via home or work computers, because they have a limited time to give, it may be personal preference, they may have certain limitations, or a home-based obligation that prevents them from volunteering on site.

There are benefits and drawbacks to using this type of volunteer. It is not intended to displace traditional volunteers, but help to expand the pool of volunteers. Due to the fact these volunteers are off site it is very important that volunteer managers keep them in touch with the rest of the organization and "take their pulse" on a regular basis. An appropriate volunteer application process and an on-site orientation is required as they begin their volunteer service. It provides human contact, a sense of belonging, and recognition with the organization. Inappropriate use of the computer could be cause for termination. (See <http://usnholpm.unh.edu/UNH/VI.Prop/F.htm#5>.)

ServiceLeader.org is a source to consult for examples and information on this form of volunteering. (See <http://www.serviceleader.org/new/>.)

## **New Hampshire Web Site Guidelines for 4-H Groups**

See <http://extension.unh.edu/4H/4HVol/WPGuide1.pdf> for these guidelines.

## **Email Use by Volunteers**

Email has become a widespread and extremely efficient form of outreach to different UNHCE audiences. Some volunteer programs, such as Master Gardeners who staff the Family Home & Garden Education Center hotline, often communicate with the public through email. However, due to the rapid and potentially informal nature of email communication, it also carries with it possible pitfalls and problems. As an example of email use policy which volunteers agree to as part of their volunteer service in the Master Gardener program, see Master Gardener Email Protocol: [http://extension.unh.edu/resources/files/Resource001191\\_Rep1515.pdf](http://extension.unh.edu/resources/files/Resource001191_Rep1515.pdf).

## **Listserv Use by Volunteers**

An email discussion forum (“listserv”) can be excellent forum for encouraging sharing of information and ideas among volunteers, staff, and others associated with a volunteer program. Lists will have a specific purpose statement, and clearly state what kind of topics or discussion is allowed on the list. Such lists represent a UNHCE-sponsored forum, and should be monitored (or moderated, if necessary) by UNHCE staff. All UNHCE policies, including those covering harassment, conflict of interest, and political activities apply to all discussion on UNHCE-sponsored listserv forums. Failure to comply with the email or listserv policies may result in an individual being removed from a UNHCE listserv or email-answering privileges. See <http://www.unh.edu/cis/aup.html>.

See the following link for the listserv “welcome statement” and policy of the NH Coverts Project volunteer program listserv:  
[http://extension.unh.edu/resources/files/Resource001193\\_Rep1521.doc](http://extension.unh.edu/resources/files/Resource001193_Rep1521.doc)