

Volunteers and Reporting



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Nonprofit Volunteers

- Today we'll cover:
 - Understanding the Value of Volunteers
 - Volunteers vs. Employees
 - Volunteer Management & Resources



Volunteer Attorneys

WE ARE VOLUNTEERS SERVING ON BOARDS

Where Nonprofit Law goes BUMP in the night with other practice areas:

- Real Estate Law (purchase, sale, property tax exemption)
- IP (copyrights, trademarks, patents)
- Employment Law (volunteers v. employees, EE v. IC, EEOC/MDHR)
- Business Law (ownership??, formation/dissolution, Articles & Bylaws, mergers)
- Tax Law (deductibility requirements, disclosures to donors, filings)
- Estate Planning (charitable bequests, family foundations, *cy pres*)
- Administrative Law (charitable gambling and other gov't licenses, government audits)
- Environmental Law (conservation, easements, pollution concerns with gifted property)
- Criminal (theft, embezzlement)
- Contracts (you name it!)
- Professional Responsibility/Ethics (conflicts of interest & fiduciary duties, advertising issues, authority to represent??)



Many Faces of Volunteers

- Board Members, Officers, and workers...a nonprofit's lifeblood!
- Volunteers are a vital resource to the nonprofit sector. The vast majority of nonprofits are governed by a volunteer Board of Directors. Plus, many nonprofits would not be able to fulfill their missions without the service of volunteers.
- Resources for recruiting, screening, training, supervising, and evaluating volunteers are necessary.



Volunteer Director Duties

- **Duty of Care** - Board Members must actively participate in the management of the organization, including, but not limited to: attending meetings of the Board, evaluating reports, reading minutes, reviewing the performance and compensation of the Executive Director, and so on. Board Members of a nonprofit organization must discharge their duties in good faith, in a manner the Board Member reasonably believes to be in the best interests of the organization, and with the care an ordinarily prudent person in a like position would exercise under similar circumstances.
- **Duty of Loyalty** - Board Members have an absolute duty of complete, undivided loyalty to the organization. This means that Board Members should avoid using their position, or the organization's assets, in a way that would result in a pecuniary or monetary gain for themselves or for any member of their family. A Board Member should put the good of the organization first and avoid engaging in transactions with the organization from which the Board Member will benefit. Any conflicts of interest between the organization and a Board Member should be resolved in favor of the organization unless the conflict of interest is waived by the Board as a whole (with the conflicted Board Member abstaining from the vote).
- **Duty of Obedience** - Board Members have a duty to follow the organization's governing documents (Articles of Incorporation and Bylaws), to carry out the organization's mission, and to ensure that funds are used for lawful purposes. Also, Board Members must comply with state and federal laws related to nonprofits and the way in which it nonprofit organizations conduct business.



Directors'/Officers' Liability in Minnesota

Minn. Stat. § 317A.257, Unpaid Non-profit Directors and Officers

The following people are not **civilly** liable for an act or omission if it was in good faith and within the scope of their official responsibilities:

- *a person who serves without compensation as a director, officer, trustee, agent or member of a non-profit organization,*
- *a person who serves without compensation as a fire chief of a non-profit fire fighting corporation or a municipal volunteer fire department.*

Exceptions: 1.) An act or omission that constituted willful or reckless misconduct. 2.) An action or proceeding brought by the attorney general for a breach of a fiduciary duty as a director. 3.) A cause of action to the extent it is based on federal law. 4.) A cause of action based on the person's express contractual obligation.



Limited Liability

Nonprofit corporations generally provide limited liability for their Directors, Officers, Trustees, Members, employees, volunteers, etc.:

- Nonprofit corporations are independent entities with their own legal liability. This is to say nonprofit corporations have a separate legal existence apart from their Directors, Officers, Trustees, Members, employees, volunteers, etc.
- Directors, Officers, Trustees, Members, employees, and volunteers serving a nonprofit corporation **WITHOUT COMPENSATION** will have limited liability, and generally not be personally liable for the debts and obligations of the nonprofit corporation.
- Exceptions to limited liability, generally: If the Director, Officer, Trustee, Member, employee, and/or volunteer
 - is paid for his/her service (i.e., paid CEO, CFO, ED)
 - breaches his/her fiduciary duties while executing his/her official responsibilities
 - is sued by the Attorney General or Secretary of State for breach of fiduciary duty
 - is sued under federal law
 - is sued based on the person's express contractual obligation (i.e., he/she signs a contract without Board approval)
 - is NOT sued based on his/her activities as a Director or Officer (outside the scope)



Directors'/Officers' Liability in Minnesota

Semi-Recent Case Law

Rehn v. Fischley, 557 N.W. 2d 328, 1997 – An unpaid director at the Humane Society directed the use of a chemical to clean cages that caused injury to a worker. The court found that § 317A.257, immunity for a non-profit volunteer is a statutory defense, and cannot be waived by failing to mention it in responsive pleadings.

Immunity is provided by the statute to those who, by their status as uncompensated persons, qualify for its protection from facing suit. The broad wording protects all uncompensated persons acting on behalf of the non-profit, not just those acting within the specific scope of their job description. Thus, a director acting outside the scope of his duty as a board member, as the director in this case did, is protected from liability as he was acting on behalf of the non-profit.



Volunteers as Valued Assets

Why Track Volunteer Time?

A.) Volunteer time has value in 2 separate contexts:

1. *In communications/Funding Requests:* Funders and donors want to know what resources your nonprofit already receives and from whom. Volunteer hours should be recorded in annual reports, marketing materials, and grant applications to funders. Funders and donors want to know they are getting a bigger “bang for their buck” and that there are people in place to get the job well done.
2. *Financial Statements:* Volunteer contributions may only be recognized (and MUST be recognized) in the financial statements as income (i.e., reviews, compilations, audits, Form 990) if the volunteer's labor meets this 3 part test:
 - a. Requires special skills;
 - b. Is performed by persons possessing such skills; and
 - c. Would typically need to be purchased if not provided by donation.

Among such services are those of “accountants, architects, carpenters, doctors, electricians, lawyers, nurses, plumbers, teachers, and other professionals and craftsmen.” SFAS 116.

B.) Volunteers appreciate appreciation – Recognize them! Show them off!!

C.) Liability protection



Volunteer Value – So What?

As a Director you should be examining the financial statements, audit reports, annual reports, etc. annually.

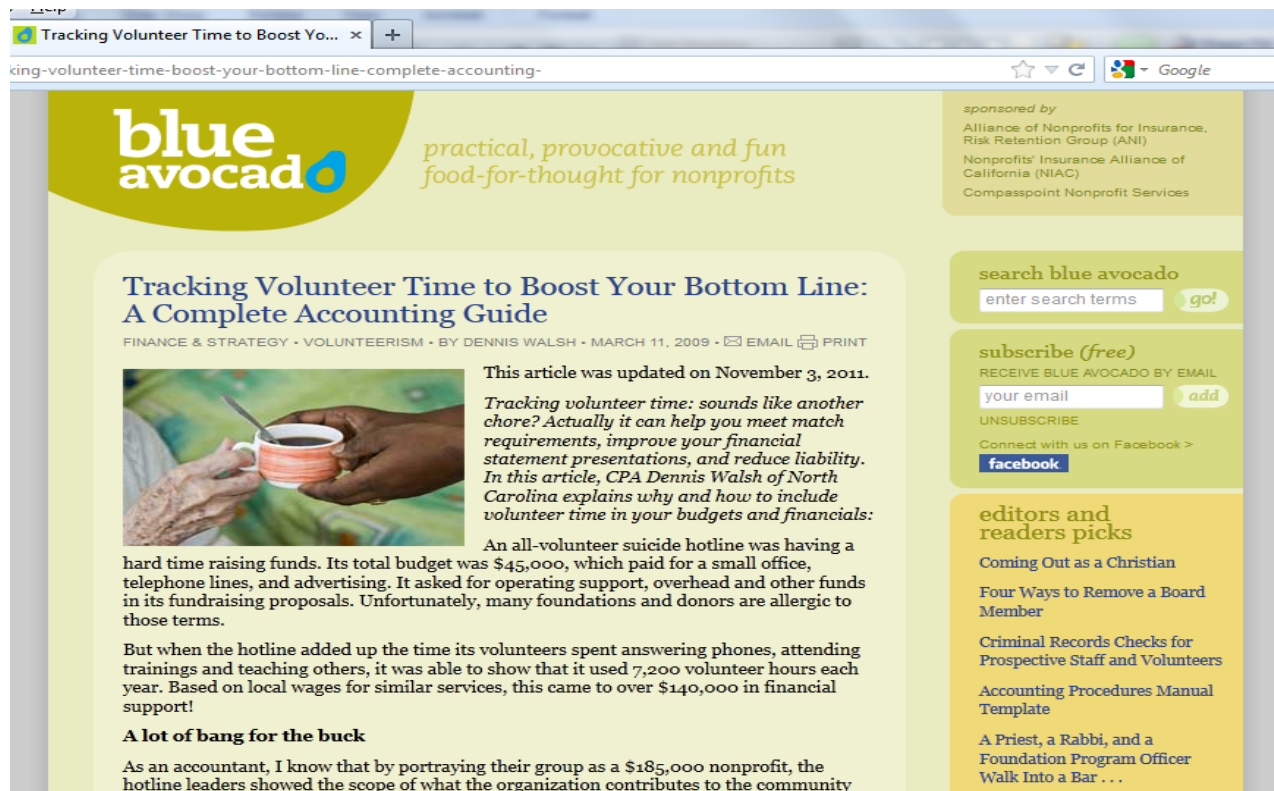
Review any listed “Donated Services” or “in-kind donations” reflected in the Statement of Activities. Does the number of volunteer hours on the financial statements seem very high? Discuss the sources of this revenue with the CFO or CPA who prepares the statements. This is an area where small nonprofits relying on inexperienced preparers may have trouble. Be sure the volunteers' in-kind hours are recorded properly on the financial statements versus the annual reports and grants.

| Hometown Hospice Care Statement of Activities (excerpt) For the Year Ended December 31, 2008 | | |
|--|--|---|
| | <i>Before including volunteer time</i> | <i>After including volunteer time</i> |
| Support: | | |
| Contributions & grants | 250,000 | 250,000 |
| <u>Donated services</u> | - | 120,000 |
| Total support | 250,000 | 370,000 |

Volunteers as Valued Assets

Read Blue Avocado's tips for “Tracking Volunteer Time To Boost Your Bottom Line – A Complete Accounting Guide”:

<http://www.blueavocado.org/content/tracking-volunteer-time-boost-your-bottom-line-complete-accounting->



The screenshot shows a web browser window displaying the Blue Avocado website. The article title is "Tracking Volunteer Time to Boost Your Bottom Line: A Complete Accounting Guide" by Dennis Walsh, dated March 11, 2009. The article discusses the importance of tracking volunteer time for nonprofits, using the example of a suicide hotline that saved money by utilizing volunteers. The website has a green and yellow color scheme with the Blue Avocado logo. On the right side, there are sections for sponsored by (Alliance of Nonprofits for Insurance, Risk Retention Group (ANI), Nonprofits' Insurance Alliance of California (NIAC), and Compasspoint Nonprofit Services), a search bar, a subscribe (free) section, and a list of editors and readers picks.

blue avocado practical, provocative and fun food-for-thought for nonprofits

Tracking Volunteer Time to Boost Your Bottom Line: A Complete Accounting Guide
FINANCE & STRATEGY • VOLUNTEERISM • BY DENNIS WALSH • MARCH 11, 2009 • EMAIL PRINT

This article was updated on November 3, 2011.

Tracking volunteer time: sounds like another chore? Actually it can help you meet match requirements, improve your financial statement presentations, and reduce liability. In this article, CPA Dennis Walsh of North Carolina explains why and how to include volunteer time in your budgets and financials:

An all-volunteer suicide hotline was having a hard time raising funds. Its total budget was \$45,000, which paid for a small office, telephone lines, and advertising. It asked for operating support, overhead and other funds in its fundraising proposals. Unfortunately, many foundations and donors are allergic to those terms.

But when the hotline added up the time its volunteers spent answering phones, attending trainings and teaching others, it was able to show that it used 7,200 volunteer hours each year. Based on local wages for similar services, this came to over \$140,000 in financial support!

A lot of bang for the buck

As an accountant, I know that by portraying their group as a \$185,000 nonprofit, the hotline leaders showed the scope of what the organization contributes to the community

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Alliance of Nonprofits for Insurance, Risk Retention Group (ANI)
Nonprofits' Insurance Alliance of California (NIAC)
Compasspoint Nonprofit Services

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your email add
UNSUBSCRIBE
Connect with us on Facebook >
facebook

editors and readers picks
Coming Out as a Christian
Four Ways to Remove a Board Member
Criminal Records Checks for Prospective Staff and Volunteers
Accounting Procedures Manual Template
A Priest, a Rabbi, and a Foundation Program Officer Walk Into a Bar ...



Volunteer Fair Market Value

Independent Sector publishes accepted rates for *non-specialized* volunteer time by State.

http://www.independentsector.org/volunteer_time#sthash.shY1xm7L.dpbs

Independent Sector's Value of Volunteer Time

National Value of Volunteer Time

The estimated value of volunteer time for 2013 is **\$22.55 per hour**.

The estimate helps acknowledge the millions of individuals who dedicate their time, talents, and energy to making a difference. Charitable organizations can use this estimate to quantify the enormous value volunteers provide.

According to the Corporation for National and Community Service, about 64.5 million Americans, or 26.5 percent of the adult population, gave 7.9 billion hours of volunteer service worth \$175 billion in 2012.¹ For the latest information, please see www.volunteeringinamerica.gov.

For more information on the economic impact of nonprofits by state, please visit our [state profiles portal](#).

State Values for Volunteer Time

| Value of a Volunteer Hour, by State: 2013 | | | |
|---|------------------------|-------------------------|-------------------------|
| Alabama: \$20.50 | Illinois: \$24.08 | Montana: \$19.64 | Rhode Island: \$23.53 |
| Alaska: \$26.50 | Indiana: \$21.56 | Nebraska: \$20.13 | South Carolina: \$20.15 |
| Arizona: \$22.52 | Iowa: \$20.93 | Nevada: \$19.05 | South Dakota: \$19.04 |
| Arkansas: \$18.93 | Kansas: \$20.88 | New Hampshire: \$22.86 | Tennessee: \$20.13 |
| California: \$26.34 | Kentucky: \$19.68 | New Jersey: \$25.33 | Texas: \$23.40 |
| Colorado: \$25.10 | Louisiana: \$22.13 | New Mexico: \$19.77 | Utah: \$22.65 |
| Connecticut: \$26.43 | Maine: \$20.10 | New York: \$26.45 | Vermont: \$21.65 |
| Delaware: \$20.29 | Maryland: \$25.43 | North Carolina: \$21.04 | Virginia: \$24.49 |
| D.C.: \$38.69 | Massachusetts: \$27.00 | North Dakota: \$23.92 | Washington: \$26.72 |
| Florida: \$21.24 | Michigan: \$22.13 | Ohio: \$21.40 | West Virginia: \$19.76 |
| Georgia: \$22.25 | Minnesota: \$24.31 | Oklahoma: \$20.88 | Wisconsin: \$21.78 |
| Hawaii: \$22.16 | Mississippi: \$19.35 | Oregon: \$21.35 | Wyoming: \$23.16 |
| Idaho: \$19.92 | Missouri: \$21.17 | Pennsylvania: \$21.94 | |



Volunteer v. Employee

Independent Contractor *or* Employee

Which are you?

For federal tax purposes, this is an important distinction. Worker classification affects how you pay your federal income tax, social security and Medicare taxes, and how you file your tax return. Classification affects your eligibility for social security and Medicare benefits, employer provided benefits and your tax responsibilities. If you aren't sure of your work status, you should find out now. This brochure can help you.

The courts have considered many facts in deciding whether a worker is an independent contractor or an employee. These relevant facts fall into three main categories: behavioral control; financial control; and relationship of the parties. In each case, it is very important to consider all the facts – no single fact provides the answer. Carefully review the following definitions.

Behavioral Control

These facts show whether there is a right to direct or control how the worker does the work. A worker is an employee when the business has the right to direct and control the worker. The business does not have to actually direct or control the way the work is done – as long as the employer has the right to direct and control the work. For example:

Instructions – if you receive extensive instructions on how work is to be done, this suggests that you are an employee. Instructions can cover a wide range of topics, for example:

- how, when, or where to do the work
- what tools or equipment to use
- what assistants to hire to help with the work
- where to purchase supplies and services

If you receive less extensive instructions about what should be done, but not how it should be done, you may be an independent contractor. For instance, instructions about time and place may be less important than directions on how the work is performed.

Training – if the business provides you with training about required procedures and methods, this indicates that the business wants the work done in a certain way, and this suggests that you may be an employee.

Financial Control

These facts show whether there is a right to direct or control the business part of the work. For example:

Significant Investment – if you have a significant investment in your work, you may be an independent contractor. While there is no precise dollar test, the investment must have substance. However, a significant investment is not necessary to be an independent contractor.

Expenses – if you are not reimbursed for some or all business expenses, then you may be an independent contractor, especially if your unreimbursed business expenses are high.

Opportunity for Profit or Loss – if you can realize a profit or incur a loss, this suggests that you are in business for yourself and that you may be an independent contractor.

Relationship of the Parties

These are facts that illustrate how the business and the worker perceive their relationship. For example:

Employee Benefits – if you receive benefits, such as insurance, pension, or paid leave, this is an indication that you may be an employee. If you do not receive benefits, however, you could be either an employee or an independent contractor.

Written Contracts – a written contract may show what both you and the business intend. This may be very significant if it is difficult, if not impossible, to determine status based on other facts.

When You Are an Employee...

- Your employer must withhold income tax and your portion of social security and Medicare taxes. Also, your employer is responsible for paying social security, Medicare, and unemployment (FUTA) taxes on your wages. Your employer must give you a Form W-2, Wage and Tax Statement, showing the amount of taxes withheld from your pay.
- You may deduct unreimbursed employee business expenses on Schedule A of your income tax return, but only if you itemize deductions and they total more than two percent of your adjusted gross income.

When You Are an Independent Contractor...

- The business may be required to give you Form 1099-MISC, Miscellaneous Income, to report what it has paid to you.
- You are responsible for paying your own income tax and self-employment tax (Self-Employment Contributions Act – SECA). The business does not withhold taxes from your pay. You may need to make estimated tax payments during the year to cover your tax liabilities.
- You may deduct business expenses on Schedule C of your income tax return.

See IRS
Publication
1779





Volunteer v. Employee

Tempting But Confusing and Dangerous: Paying Volunteers “Just a Little Something”

by George L. Head, Ph.D.

<http://www.nonprofitrisk.org/library/articles/volunteer052004.shtml>

Is the “little something” compensation? And, is giving it worth turning the volunteer into an employee??



Volunteer v. Employee

Nonprofit interns: <http://www.councilofnonprofits.org/interns>

nonprofits.org/interns

Why is it Important to Understand Nonprofit Internships?

Interns can be terrific additions to a nonprofit's capacity building journey, but it's important to clarify whether interns are unpaid *volunteers* or paid *employees* – or something in between. In particular, there could be unintended consequences if an intern receives a stipend that could transform a volunteer intern into what the Department of Labor would consider an *employee*, resulting in a risk that the nonprofit could owe back wages (to pay the intern [at least minimum wage](#)) and back taxes.

[Download our Checklist for Nonprofits on recruiting interns.](#)

Frequently Asked Questions about Nonprofit Internships

How does receiving a stipend turn an intern into an employee?

A stipend is compensation for services provided to the nonprofit. Those who perform work in exchange for compensation are either [employees](#) or [independent contractors](#), their payments and tax withholdings from wages is regulated by the Department of Labor (federal and state).

If a nonprofit provides a "stipend" to a "volunteer" intern – that is sending a mixed message to the Department of Labor. (Compensation in excess of \$600 must be reported on an IRS Form 1099 per rules for [independent contractors](#).)

While there are some exceptions, most employees must receive minimum wage in accordance with federal and state law. One exception under federal Department of Labor rules is for trainees, who, assuming they qualify, do not have to be paid minimum wage (and thus may receive a stipend that amounts to less than minimum wage). To be considered a "trainee" the internship must benefit the intern – not the employer. The requirements are described in [Department of Labor Fact Sheet #71: Internship Programs Under The Fair Labor Standards Act](#), issued last year. (While written primarily as guidance for for-profit business concerns, the Fact Sheet also applies to nonprofit workplaces that pay interns.) Nonprofits that pay interns a stipend below minimum wage should be familiar with this Fact Sheet and document how their internship program satisfies the criteria so that the intern can be classified as a trainee.

What if a nonprofit does not pay its interns?



Volunteer Management 101

Nonprofit Volunteers: Top Five Tips to Keep Them Coming

<http://www.nolo.com/legal-encyclopedia/nonprofit-volunteers-top-five-tips-30075.html>

Keeping nonprofit volunteers around for more than a few shifts can be a challenge. Learn the tricks to creating a loyal volunteer corps.

If you can maintain a loyal corps of volunteers, your nonprofit can get more done for less money (sometimes substituting for paid staff), create community involvement, and increase your organization's visibility.

Yet all too often, nonprofits spend long hours recruiting and training volunteers, only to have them leave after a few shifts.



A Better Way...

1. Tap Into Volunteers' Motives

Don't volunteers just want to help your cause? Well, yes and no. They no doubt have good hearts and believe in your organization's work. But most volunteers have additional reasons for volunteering—perhaps looking to meet new people, to develop skills, and to feel needed. If you assign them to stand by a photocopier for long hours, it may not satisfy any of those motives.

Ask volunteers at the outset what they'd like to get from their experience, and look for ways to satisfy that. If, for example, a volunteer is hoping to use photography skills, ask her to build up a collection of photos ready for use in your newsletter, annual report, or website. If you have regular volunteers, try to schedule them so that they overlap and can talk with one another.



A Better Way...

2. Tell Volunteers What You Expect

Start by giving each volunteer some formal training. Explain the work of your organization and the volunteer's place in it, including the importance of seemingly ministerial tasks. Discuss what you normally expect volunteers to do and what more interesting tasks they might “graduate” to after proven good work. You might also want to create a volunteer manual, explaining:

- what you expect of volunteers in terms of hours, behavior, notifying you of when they'll be late or absent, and so forth
- your commitment to making the volunteer experience a positive opportunity for community involvement, and
- basic office policies such as personal use of the phones and photocopiers.

Be ready to provide feedback on how your volunteers are doing, particularly if they're trying to develop job skills. At the initial training, tell the volunteer that you'll periodically sit down for a review—and make clear that the volunteer will then have a chance to tell you how he or she is enjoying the volunteer experience and what would make it better.



A Better Way...

3. Make Volunteering Convenient

Most nonprofits want volunteers to commit to working a certain number of hours per week or month. But creating alternatives to this model can be a good idea. Your best source of daytime volunteers may be freelancers who have spare time—but not always at the same time each week.

Some organizations, for example, ask people to make a general commitment of hours, but then to call ahead and advise the organization of when they'll actually be putting in those hours. Others may recruit heavily for one-time events, or ask volunteers to take on a particular time-limited project.



A Better Way...

4. Make Volunteering Fun

You don't have to create a party atmosphere for your volunteers, but realize that some tasks are innately more fun than others. For example, if you work with kids or animals, it's a fair bet that most of your volunteers are hoping for some contact with them too.

Of course, how much use you can make of unskilled help depends on the kind of work you do. Still, you can think innovatively about what tasks volunteers can do. For example, one organization that helps low-income girls prepare for college invited student volunteers to give talks about their college experience. Those volunteers weren't stepping into professional staff roles, but there were taking the pressure off the staff, and breathing new life into the program.



A Better Way...

5. Show Appreciation

Every volunteer wants to know that he or she is making a difference and advancing the cause. It's your job to make sure the volunteer knows this, for example by:

- saying thank you, early and often;
- planning some organized volunteer-appreciation activities, particularly if you have a large volunteer corps;
- holding an annual volunteer party;
- inviting volunteers to your nonprofit's other events, such as a holiday party, lecture, or annual dinner; and
- giving little speeches at events saying how much particular volunteers have done for your organization, and accompanying this with awards, certificates, or small plaques.



Volunteers and Volunteering

The U.S. Bureau of Labor Statistics tracks the number and demographics of Americans volunteering in their communities.

- The volunteer rate declined by 1.1 percentage points to 25.4 percent for the year ending in September 2013. About 62.6 million people volunteered through or for an organization at least once between September 2012 and September 2013.
- The volunteer rates for both men and women (22.2 percent and 28.4 percent, respectively) declined in the year ending in September 2013. Women continued to volunteer at a higher rate than did men across all age groups, educational levels, and other major demographic characteristics.
- By age, 35- to 44-year-olds were the most likely to volunteer (30.6 percent, respectively). Volunteer rates were lowest among 20- to 24-year-olds (18.5 percent). For persons 45 years and over, the volunteer rate tapered off as age increased. Teens (16- to 19-year-olds) had a volunteer rate of 26.2 percent.
- Among the major race and ethnicity groups, whites continued to volunteer at a higher rate (27.1 percent) than did blacks (18.5 percent), Asians (19.0 percent), and Hispanics (15.5 percent). The volunteer rate fell for whites (by 0.7 percentage point) and blacks (by 2.6 percentage points) in 2013. The volunteer rates for Asians and Hispanics were little changed.
- Married persons volunteered at a higher rate (30.7 percent) in 2013 than did those who had never married (20.0 percent) and those with other marital statuses (20.5 percent). The rates declined over the year for each marital status category. In 2013, the volunteer rate of parents with children under age 18 (32.9 percent) remained higher than the rate for persons without children (22.7 percent). The volunteer rate of persons without children under age 18 declined over the year, while the rate for parents was little changed.
- Individuals with higher levels of education engaged in volunteer activities at higher rates than did those with less education in 2013. Among persons age 25 and over, 39.8 percent of college graduates volunteered, compared with 27.7 percent of persons with some college or an associate's degree, 16.7 percent of high school graduates, and 9.0 percent of those with less than a high school diploma. The rate of volunteering was about unchanged for people with less than a high school diploma, while the rate declined for persons in all other educational attainment categories.



Volunteers and Volunteering


The Corporation for National and Community Service also reports data and trends relating to volunteerism at <http://www.volunteeringinamerica.gov/>.

- Top Five States for Volunteer Rate:
 - Utah
 - **Minnesota**
 - Idaho
 - Kansas
 - Iowa
- Top Five Large Cities for Volunteer Rate:
 - **Minneapolis-St Paul, MN**
 - Rochester, NY
 - Milwaukee, WI
 - Seattle, WA
 - Salt Lake City, UT



Resources: Managing Volunteers

Volunteer Match - Learning Center - <http://learn.volunteermatch.org/training-topics>

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All Upcoming Webinars


Note: Please note time zones.

| Title | Topic | Date/Time | Cost |
|--|---|-------------------------|------|
| From SXSW to Impact: What's Next for Social Good? | Nonprofit Insights Series | 4/9 11:00 PT / 2:00 ET | Free |
| The New Volunteer Manager's Toolkit | Introductory Approaches | 4/15 11:00 PT / 2:00 ET | Free |
| Playing by the Rules: Creating an Effective Volunteer Handbook | Core Components | 4/17 11:00 PT / 2:00 ET | Free |
| Creating a Comprehensive and Engaging Volunteer Training Program | Core Components | 4/24 11:00 PT / 2:00 ET | Free |
| Successful Volunteer Interview Strategies | Core Components | 5/13 11:00 PT / 2:00 ET | Free |
| Social Media and Volunteer Engagement | Introductory Approaches | 5/15 11:00 PT / 2:00 ET | Free |
| Measuring Success: How to Strategically Assess Your Program | Advanced Practices | 5/22 11:00 PT / 2:00 ET | Free |
| Engaging the Volunteer of the Future | Introductory Approaches | 6/5 11:00 PT / 2:00 ET | Free |
| Telling the Story of Volunteer Impact | Advanced Practices | 6/10 11:00 PT / 2:00 ET | Free |
| Developing a Strategic Plan for Volunteer Engagement | Advanced Practices | 6/24 11:00 PT / 2:00 ET | Free |
| Single Days of Service: Make it Work! | Introductory Approaches | 7/8 11:00 PT / 2:00 ET | Free |

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- [Tools Training Videos](#)
- [Engaging Volunteers Blog](#)

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Resources: Managing Volunteers

Links to resources on effective practices for volunteer management:

<http://www.idealists.org/info/VolunteerMgmt/Best>

A screenshot of a web browser displaying the 'Volunteer Management Resource Center' page. The browser's address bar shows 'Agmt/Best' and the search bar contains 'Google'. The page title is 'Volunteer Management Resource Center »'. The main heading is 'Best Practices for Volunteer Management Professionals'. To the right of the heading are buttons for 'Bookmark', 'Email', 'Share', and 'Print'. Below the heading is a large text block containing two paragraphs and a bulleted list of topics. To the right of the text block is a search bar and an 'Explore' sidebar with a tree view of navigation links.

Agmt/Best

Volunteer Management Resource Center »

Best Practices for Volunteer Management Professionals

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The experts in the field of volunteer management are the individuals already out there, doing the day to day work of finding, matching, supporting, and recognizing volunteers. In other words: you. With that in mind, we're offering up a section of best practices – tools, models, advice – to guide your work. So whether you're looking for great strategies on how to find volunteers, seeking innovative ways to communicate with volunteers via technology, or not sure how to determine whether or not your organization can engage volunteers in meaningful ways, this is the place.

Many of these best practices have already been identified by our partners at Energize, Inc., so where that's applicable, we've included a link to their site.

Note that this section largely provides models and tools for doing the day-to-day work of volunteer management. While these come from volunteer management professionals all over the world, most if not all are universal in application; where the information is country-specific, the country name is listed in parentheses after the resource title and author.

- › Organizational Readiness
- › Risk Management
- › Developing Your Volunteer Program
- › Finding Volunteers
- › Screening, Selecting, and Matching Volunteers
- › Training Volunteers
- › Support, Supervision, and Retention
- › Financial Management
- › Motivation and Recognition

Search this info center

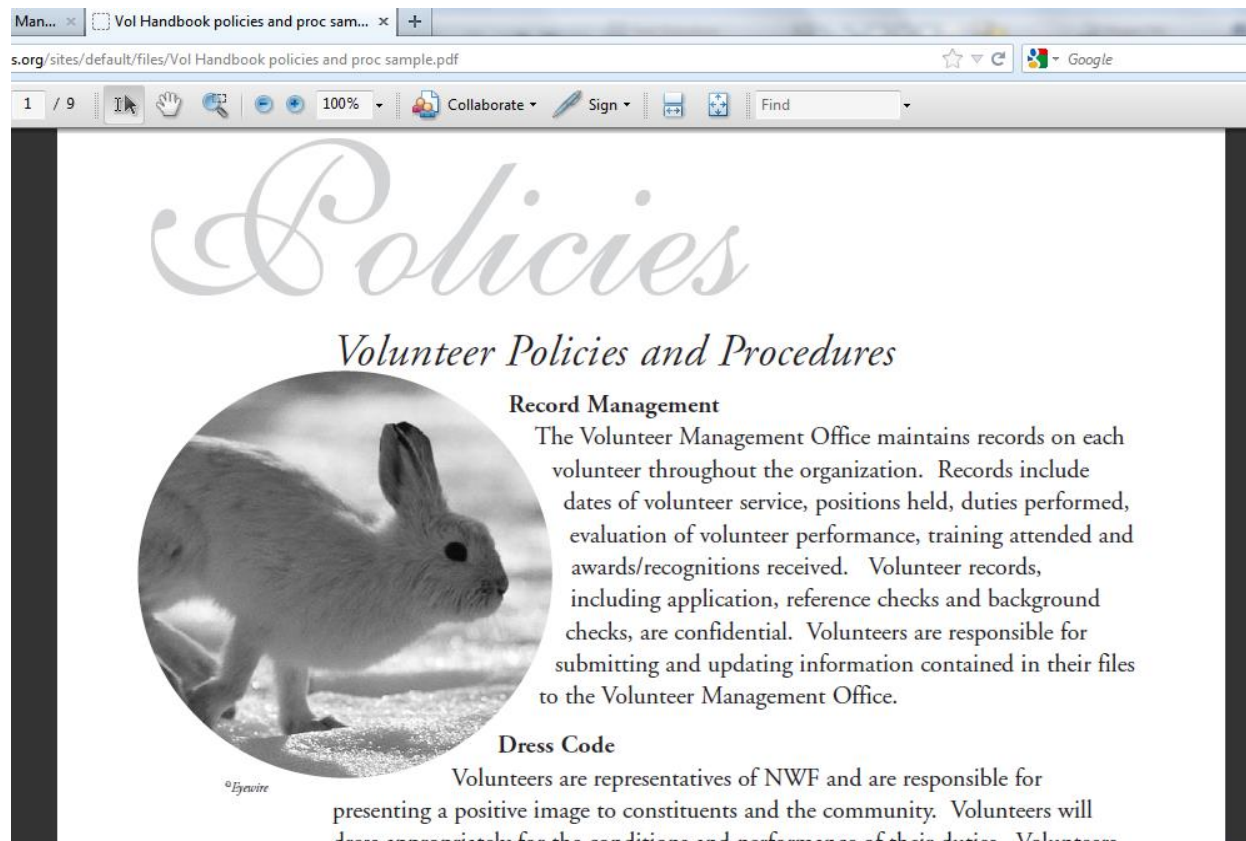
Explore

- Volunteer Management
 - What is Volunteer Management?
 - Best Practices
 - Professional Development
 - Human Resource Managers
 - Resources
 - Support Networks

Resources: Managing Volunteers

Model Volunteer Policies Handbook from the National Wildlife Federation:

<http://www.councilofnonprofits.org/sites/default/files/Vol%20Handbook%20policies%20and%20proc%20sample.pdf>




Resources: Managing Volunteers

Sample Youth Volunteer Waiver and Publicity Release:

<http://www.councilofnonprofits.org/sites/default/files/SAMPLE%20Youth%20Volunteer%20Waiver%20and%20Publicity%20Release.doc.pdf>

rg/sites/default/files/SAMPLE Youth Volunteer Waiver and Publicity Release.doc.pdf

100% Collaborate Sign Find

 **Volunteer
Waiver and Release
Form**

Volunteer Name: _____

Check here if Volunteer is under age 18 ☐

Contact E-mail (required): _____

Parent or Legal Guardian Email (required if Volunteer is under age 18): _____

Address: _____

Phone: _____

Emergency Contact

Name: _____

Relationship to Participant: _____



Resources: Managing Volunteers

Sample Minor Waiver courtesy of Habitat for Humanity, San Antonio, Texas:

<http://www.councilofnonprofits.org/sites/default/files/Sample%20Minor%20Waiver%20Habitat%201.2009.pdf>

Sample Minor Waiver Habitat 1.2009.pdf (application/pdf Object) - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Effective Practices for Volunteer Man... Sample Minor Waiver Habitat 1.2009...

www.councilofnonprofits.org/sites/default/files/Sample Minor Waiver Habitat 1.2009.pdf

Please fill out the following form.

Important: Each volunteer must sign the "Release and Waiver Liability" before working on a Habitat for Humanity site. Read this waiver very carefully before you sign. Waiver applicable 1 year from date of signature.

Waiver of Liability for Minors (age 14 - 17)

This release and Waiver of Liability (the "Release") executed on this [] day of [], 20[], by the minor volunteer and his/her legal guardian [] in favor of HABITAT FOR HUMANITY OF SAN ANTONIO, INC., a nonprofit corporation organized and existing under the laws of the State of Texas, USA and Habitat for Humanity International, Inc. in Americus, GA and both of their directors, officers, employees, and agents (collectively, "Habitat").

The Minor [], desires to work as a volunteer for Habitat for Humanity and engage in the activities related to being a volunteer for a work project. I, the legal guardian [], hereby freely and voluntarily, without duress, execute this Release under the following terms:

- 1. Waiver and Release.** The guardian and minor release and forever discharges and hold harmless Habitat and its successors and assigns from any and all liability, claims, and demands of whatever kind or nature, either in law or in equity, which arise or may hereafter arise from the minor's volunteer work at Habitat. The guardian/volunteer understands and acknowledges that this Release discharges Habitat from any liability or claim that guardian and minor may have against Habitat with respect of bodily injury, personal injury, illness, death, or property damage that may result from participation on the Habitat worksite. It is also understood that Habitat does not assume any responsibility for or obligation to provide financial assistance or other assistance, including but not limited to medical, health or disability insurance in the event of injury, illness, death or property damage



Resources: Managing Volunteers

Sample Adult Waiver courtesy of Habitat for Humanity, San Antonio, Texas:

<http://www.councilofnonprofits.org/sites/default/files/SAMPLE%20Adult%20Volunteer%20Waiver%20Habitat%201.2009.pdf>

A screenshot of a Mozilla Firefox browser window displaying a PDF document titled "SAMPLE Adult Volunteer Waiver Habitat 1.2009.pdf". The browser's address bar shows the URL: www.councilofnonprofits.org/sites/default/files/SAMPLE%20Adult%20Volunteer%20Waiver%20Habitat%201.2009.pdf. The document content includes a purple header bar with the text "Please fill out the following form." and a "Highlight Fields" button. The main text of the document is as follows:

Important: Each volunteer must sign the "Release and Waiver of Liability" before working on a Habitat for Humanity site. Please complete this form and bring it with you before you begin work. *Read this waiver very carefully before you sign.*

Waiver of Liability

This Waiver of Liability (the "Waiver") executed on this [] day of [], 20[], by [] (the "Volunteer") in favor of HABITAT FOR HUMANITY OF SAN ANTONIO, INC., a nonprofit corporation organized and existing under the laws of the State of Texas, USA, and Habitat for Humanity International, Inc. in Americus, GA, and both of their directors, officers, employees, and agents (collectively, "Habitat").

I, the Volunteer, desire to work as a volunteer for Habitat for Humanity and engage in the activities related to being a volunteer for a work project.

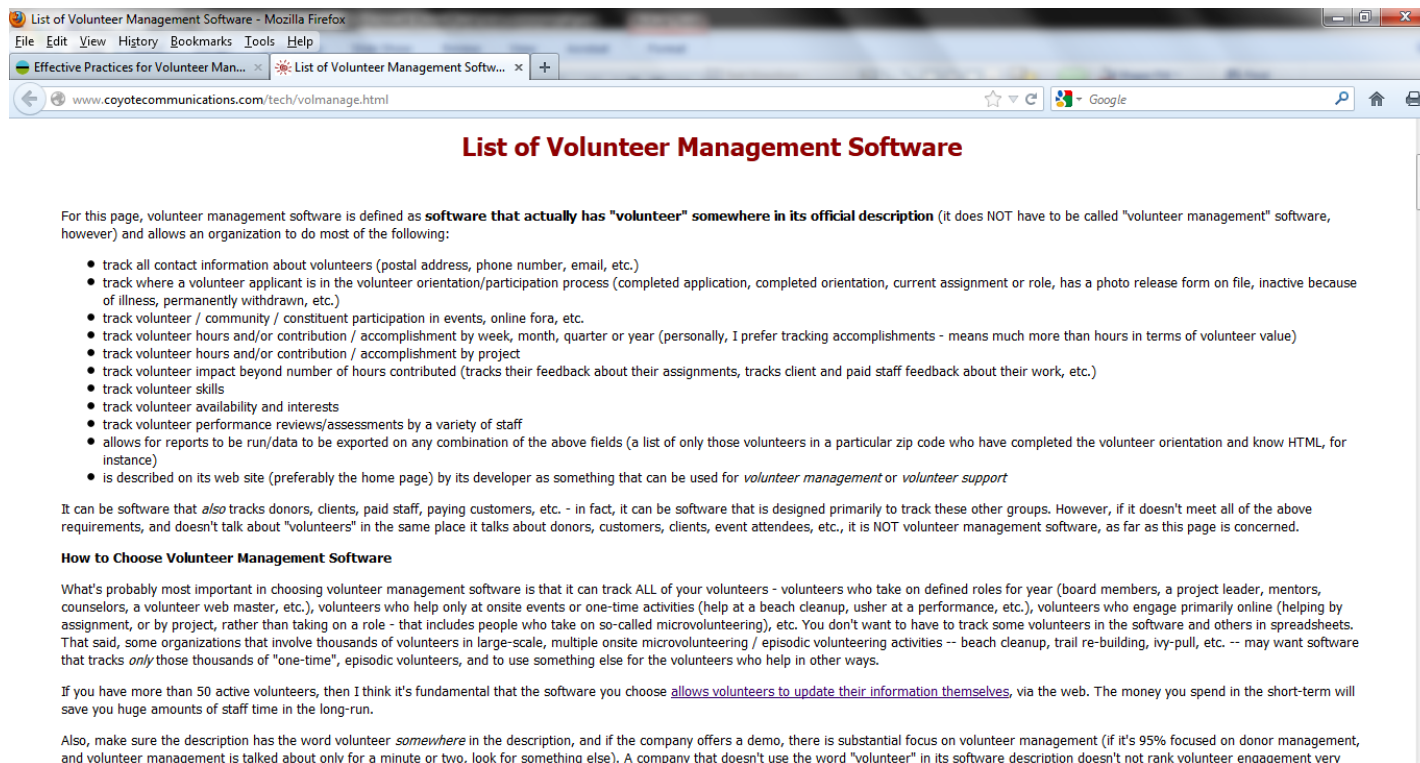
I hereby freely and voluntarily, without duress, execute this Waiver under the following terms:

1. Waiver and Release. I, the Volunteer, release and forever discharge and hold harmless Habitat and its successors and assigns from any and all liability, claims, and demands of whatever kind or nature, either in law or in equity, which arise or may hereafter arise from my volunteer work with Habitat.

Resources: Managing Volunteers

List of free software tools for volunteer management:

<http://www.coyotecom munications.com/tech/volmanage.html>



List of Volunteer Management Software

For this page, volunteer management software is defined as **software that actually has "volunteer" somewhere in its official description** (it does NOT have to be called "volunteer management" software, however) and allows an organization to do most of the following:

- track all contact information about volunteers (postal address, phone number, email, etc.)
- track where a volunteer applicant is in the volunteer orientation/participation process (completed application, completed orientation, current assignment or role, has a photo release form on file, inactive because of illness, permanently withdrawn, etc.)
- track volunteer / community / constituent participation in events, online fora, etc.
- track volunteer hours and/or contribution / accomplishment by week, month, quarter or year (personally, I prefer tracking accomplishments - means much more than hours in terms of volunteer value)
- track volunteer hours and/or contribution / accomplishment by project
- track volunteer impact beyond number of hours contributed (tracks their feedback about their assignments, tracks client and paid staff feedback about their work, etc.)
- track volunteer skills
- track volunteer availability and interests
- track volunteer performance reviews/assessments by a variety of staff
- allows for reports to be run/data to be exported on any combination of the above fields (a list of only those volunteers in a particular zip code who have completed the volunteer orientation and know HTML, for instance)
- is described on its web site (preferably the home page) by its developer as something that can be used for *volunteer management* or *volunteer support*

It can be software that *also* tracks donors, clients, paid staff, paying customers, etc. - in fact, it can be software that is designed primarily to track these other groups. However, if it doesn't meet all of the above requirements, and doesn't talk about "volunteers" in the same place it talks about donors, customers, clients, event attendees, etc., it is NOT volunteer management software, as far as this page is concerned.

How to Choose Volunteer Management Software

What's probably most important in choosing volunteer management software is that it can track ALL of your volunteers - volunteers who take on defined roles for year (board members, a project leader, mentors, counselors, a volunteer web master, etc.), volunteers who help only at onsite events or one-time activities (help at a beach cleanup, usher at a performance, etc.), volunteers who engage primarily online (helping by assignment, or by project, rather than taking on a role - that includes people who take on so-called microvolunteering), etc. You don't want to have to track some volunteers in the software and others in spreadsheets. That said, some organizations that involve thousands of volunteers in large-scale, multiple onsite microvolunteering / episodic volunteering activities -- beach cleanup, trail re-building, ivy-pull, etc. -- may want software that tracks *only* those thousands of "one-time", episodic volunteers, and to use something else for the volunteers who help in other ways.

If you have more than 50 active volunteers, then I think it's fundamental that the software you choose [allows volunteers to update their information themselves](#), via the web. The money you spend in the short-term will save you huge amounts of staff time in the long-run.

Also, make sure the description has the word volunteer *somewhere* in the description, and if the company offers a demo, there is substantial focus on volunteer management (if it's 95% focused on donor management, and volunteer management is talked about only for a minute or two, look for something else). A company that doesn't use the word "volunteer" in its software description doesn't not rank volunteer engagement very

Resources: Managing Volunteers

Volunteer Spot offers free tools for scheduling, coordinating, and organizing volunteers:

<http://www.volunteerspot.com/nonprofits/>

The screenshot shows the VolunteerSpot website interface. At the top, there's a navigation bar with links: Home, About Us, eBooks, Partners, Fundraising Ideas, Collect \$\$, Love, and Help. Below this is a banner with the VolunteerSpot logo and the tagline "DOING GOOD Just Got Easier!". To the right of the logo are several partner logos: Safety Council of the Ozarks, 4C for Children, St Anselm's Cross Cultural CC, Intervention Services-Village, Community Care, and a "CLICK TO VOTE NOW 100CarsForGood.com" button. Below the banner is a row of five images showing various volunteer activities. To the right of the images is a "MY ACCOUNT" section with a "SIGN IN" button. Below the images is a large green banner with the text "Welcome, Community Nonprofits! Volunteer scheduling made EASY for coordinators, committee chairs & volunteers!". Below this banner is a section titled "See How It Works — Send yourself a sample signup invitation" with a "Start a Demo" button. To the right of this section is a "Get Started. Plan Now." button. Below the "See How It Works" section are three items: "Volunteer Coordinator" (makes the schedule online and invites volunteers to signup with an email), "Volunteers" (sign up on a calendar with a click — choosing when to help and what to bring), and "VolunteerSpot" (sends automated confirmation and reminder messages). To the right of these items is a "Learn More:" section with links: "Family Friendly Volunteering: Ideas from A-Z", "Ideas, Tips & Stories about Volunteering:", "Tips & Ideas for Volunteering at School", "Cut the Clutter: Personal Organization Tips", and "Fresh Fundraising Ideas". On the far right, there is a vertical sidebar with a "carnivals + festivals PLANNING" graphic and a photo of two children with clown noses.

Resources: Managing Volunteers

Energize, Inc. offers a variety of resources on volunteers and volunteering, including “Satisfying Staff First,” an article by Ivan H. Scheier that presents an analysis of the complexities of the relationship between volunteers and staff.

The screenshot shows a web browser window with the address bar displaying 'v/art.html#types'. The page is titled 'Volunteer Resource Library' and features a navigation menu with four main categories: 'Volunteer Management Skill Area', 'Types of Volunteers', 'About the Subject of Volunteering', and 'About the Profession'. Each category has a list of sub-topics.

| Volunteer Management Skill Area | Types of Volunteers | About the Subject of Volunteering | About the Profession |
|--|--|---|--|
| <ul style="list-style-type: none"> All-Volunteer Group Development Collaboration Committees Community Organizing Corporate Social Responsibility Delegation Diversity Employee Volunteering Employee/Volunteer Relations Ethics Evaluation Event Planning Executive Director, Role of Financial Management Fundraising Inclusion Internet-related Interviewing Leadership Legal Issues Membership Development Motivation Online Community | <ul style="list-style-type: none"> Boards of Directors Business and Corporate Children and Youth Family Volunteering Older Volunteers People with Disabilities Professions in Service/Pro Bono Volunteering Entrepreneurial and Self-directed Service Students in Service | <ul style="list-style-type: none"> Benefits of Volunteering (for the volunteer individually) Definitions of "Volunteer" For Individual Volunteers Government Relations/Codes History Humor Image of Volunteering Legislation Monetary Value of Volunteer Time Philosophy Research on Volunteering Software Statistics on Volunteering Trends and Issues | <ul style="list-style-type: none"> Field of Volunteer Management Salary Ranges in the Field Volunteer Centers |

Settings in Which Volunteers Are Found or What Volunteers Do

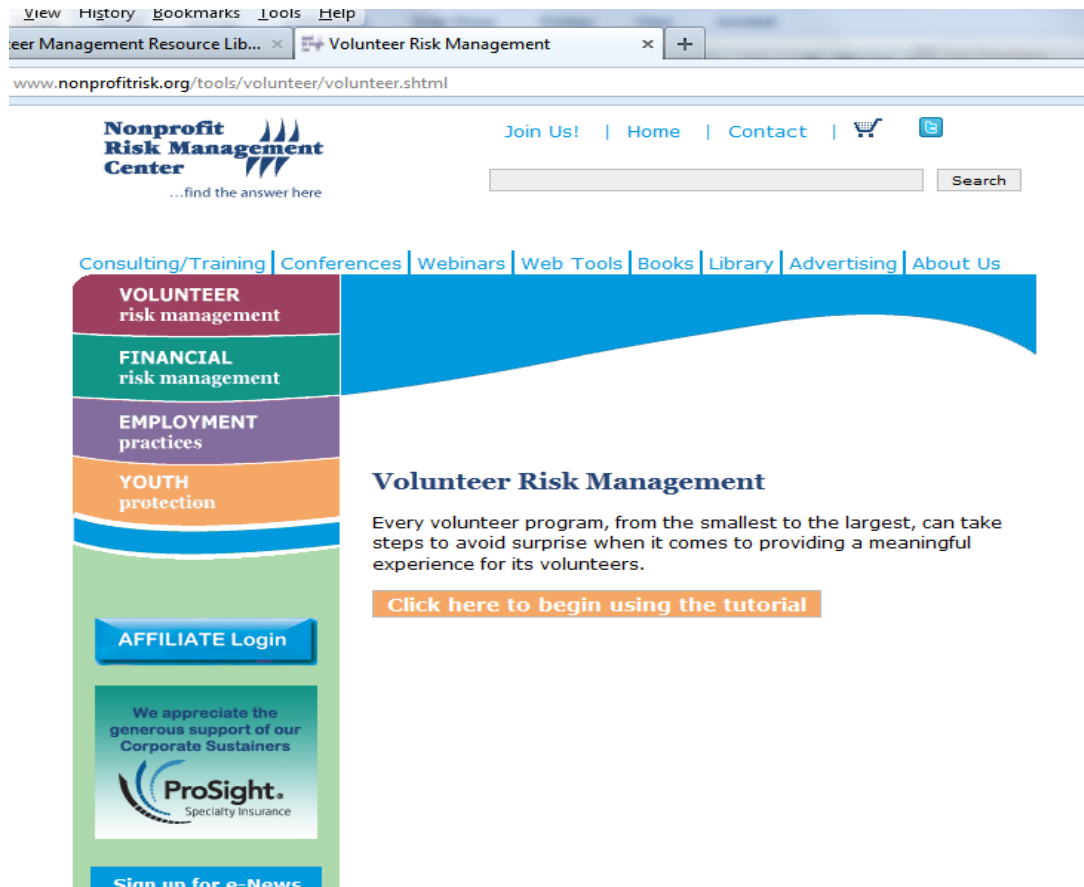
- All-volunteer groups
- Auxiliaries
- Disaster Response
- Faith-based Service
- Friends of... Groups
- Government Settings
- Healthcare Settings
- International Focus
- Library Settings
- Mentoring

Looking for Other Volunteer Management Sources?

Resources: Managing Volunteers

Hone your volunteer and risk management skills with this online tutorial on Volunteer Risk Management from the Nonprofit Risk Management Center:

<http://www.nonprofitrisk.org/tools/volunteer/volunteer.shtml>

The image is a screenshot of a web browser displaying the Nonprofit Risk Management Center website. The browser's address bar shows the URL 'www.nonprofitrisk.org/tools/volunteer/volunteer.shtml'. The website's header includes the NRC logo, navigation links like 'Join Us!', 'Home', 'Contact', and a search bar. A horizontal menu lists various resources: Consulting/Training, Conferences, Webinars, Web Tools, Books, Library, Advertising, and About Us. On the left side, there is a vertical stack of colored buttons for 'VOLUNTEER risk management' (red), 'FINANCIAL risk management' (green), 'EMPLOYMENT practices' (purple), and 'YOUTH protection' (orange). The main content area is titled 'Volunteer Risk Management' and contains a paragraph explaining that every volunteer program can take steps to avoid surprise. Below this text is an orange button that says 'Click here to begin using the tutorial'. At the bottom of the page, there is an 'AFFILIATE Login' button, a message of appreciation for corporate sustainers, the ProSight Specialty Insurance logo, and a 'Sign up for e-News' button.

Thank you!!!



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