COMPETENCIES
FOR
MANAGERS OF VOLUNTEERS

Overview

MANAGING SELF: TRAITS AND CORE COMPETENCIES

MANAGING PEOPLE: SUPERVISION & HUMAN RESOURCES

MANAGING PROJECT & PROGRAMS: MANAGEMENT & OPERATIONS

LEADING ORGANIZATIONS: LEADERSHIP

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DISABILITY INCLUSION RESOURCES FOR MANAGERS OF VOLUNTEERS: AN INTRODUCTION

Purpose

Many organizations and community groups use volunteers to carry out key elements of their missions. Although the majority of these organizations support and value diversity and respect for the human dignity of all people, applying these principles to create inclusive volunteer communities can sometimes be a complex undertaking (Miller & Schleien, 2010).[1]

This update to *Competencies for Managers of Volunteers* was developed to enhance and strengthen competencies specific to disability inclusion. It is a guide to aid you, as a manager of volunteers, in creating more inclusive opportunities for individuals with disabilities. The authors of *Competencies for Managers of Volunteers* (Maine Commission for Community Service 2008) noted, "A competent volunteer manager sustains the program by providing rich, varied, useful experiences for volunteers that support the mission of organizations to meet the needs of the community."

However, you may be one of many volunteer managers who may have little to no experience recruiting, matching and supervising people who have disabilities. The additional resources and information included in this updated version of *Competencies for Managers of Volunteers* will provide you with information in a number of critical areas such as *inclusive recruitment*, *provision of accommodations*, *orientation*, *adapting tasks and activities*, *matching volunteers with assignments*, *evaluation* and other areas that will make it easier for you to recruit and assign volunteers with disabilities.

Background and Research

How did we get to this point? Through a cooperative agreement in 2010, the Maine Commission for Community Service (MCCS) and the University of Maine Center for Community Inclusion and Disability Studies (CCIDS) created and updated materials to enhance the *Competencies for Managers of Volunteers* publication. Our intent was to facilitate the engagement of individuals with disabilities in volunteering by building the capacity of volunteer managers and supervisors in Maine's National Service and community-based volunteer programs.

Using the 2008 Maine Commission for Community Service publication, *Competencies for Managers of Volunteers*, as a starting point, we developed the 2011 update by reviewing current research and best practices advocated by the following organizations: the National Service Inclusion Project (NSIP), a cooperative agreement between the Corporation for National and Community Service and the Institute for Community Inclusion at UMass Boston; the Job Accommodation Network (JAN), a service of the U.S. Department of Labor, Office of Disability Employment Policy (ODEP); and the Corporation for National and Community Service Resource Center.

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[1]Quoted in Miller, K., Schleien, S., Brooke, P., & Merrill, M. (2005). What's in it for me and my agency? A survey on the benefits of engaging volunteers with disabilities. *The Journal of Volunteer Administration, 23*(3)*,* 16-23*.*

In 2009, the Maine Commission for Community Service reported a 34.4% rate of volunteering among Maine citizens.[2] It is not known what proportion of Maine's volunteers are persons with disabilities. However, based on national data, 19 % of the population has a disability.[3] There are other studies that believe that these numbers are low. According to one national study, individuals with disabilities account for only 5.7% of the volunteer pool. People with disabilities generally welcome the opportunity to serve their communities as volunteers, but they often report that they are not asked. Other persons with disabilities have said that they are not even aware of opportunities to volunteer. The Canadian publication, *Volunteer Connections*, issued the following challenge to organizations:

> Consider your organization for a moment. Who are your average volunteers? Are they typically a particular age or sex? Do they tend to be of a certain ethnic background or socio-economic status? Then take a look around your community. What parts of the community are you involving as volunteers? More importantly, who is missing?[4]

The enhanced *Competencies for Managers of Volunteers: Update 2011* provides you with the information and tools to take on the challenge and develop the skills to actively recruit from a broader volunteer pool that includes persons with disabilities. Moreover, the updated version of the *Competencies for Managers of Volunteers* also includes ways for you to assign, oversee, and reinforce the skills and participation of persons with disabilities in your programs. Let's get started.

How to Use *Competencies for Managers of Volunteers: Update 2011*
This updated version describes the competencies generally acknowledged to be important for you to demonstrate to be successful as a manger of volunteers. Some of these are especially important to recruiting and retaining volunteers with disabilities.

Each volunteer management competency has indicators that progress through four skill levels: NOVICE, INTERMEDIATE, ADVANCED, and EXPERT. Please see Figure 1 on the following page for an example of how one set of competency indicators progresses through the skill levels under **A: SUPERVISION AND HUMAN RESOURCES**, Section A.2, Recruit Volunteers.

It is recommended that you first review the introductory paragraph that precedes each section of volunteer management competencies to obtain a general description of the selected indicators. Any indicator that is followed by a bold asterisk (*****) signifies that relevant resources and/or websites pertaining to that indicator are provided for your

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[2]Maine Commission for Community Service. (2010). *Enhancing the Capacity of Maine's Volunteer Sector. Volunteer Sector Status Report and 2010-2013 Strategic Plan*. Augusta, ME.

[3] Stoddard, S., Jans, L., Ripple, J. & Kraus, L. (1998). *Chartbook on Work and Disability in the United States, 1998.* An InfoUse Report. Washington, D.C. National Institute on Disability and Rehabilitation Research.

[4] Volunteer Canada. (2001). *Volunteer Connections: Creating an Accessible and Inclusive Environment.* Ottawa, ON, pg. 3.

reference. These resources and/or websites can be accessed electronically by following the links provided in the corresponding Appendix section.

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A. SUPERVISION AND HUMAN RESOURCES

A.2 Recruit Volunteers

Skill Level	Indicators
"Novice" Acquire basic vocabulary & knowledge	Identify appropriate sources of volunteers.
"Intermediate" Apply skills and knowledge	Write a customized advertisement that attracts potential applicants.
"Advanced" Plan, Do, Study, Adapt (PDSA)	Analyze effectiveness of recruiting strategies and make appropriate changes.
"Expert" Apply knowledge in a range of contexts	Recognize the strengths of applicants and refer to other programs when relevant.

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Figure 1: Examples of competency indicators progressing through the four skill levels.

Competencies for Managers of Volunteers

Background and Research.
The Maine Commission for Community Service contracted with Larry Ullian of the Edmund S. Muskie School of Public Service to identify competency-based models for Managers of Volunteers and to adapt them to the needs of AmeriCorps program directors. The project began with a review of the relevant literature, interviews with current Managers of Volunteers, and descriptions of Managers of Volunteers in other nonprofit settings (e.g. emergency preparedness, health care, and cooperative extension). This model is the result of synthesizing the research on a wide range of models, including existing college and university curricula, and the Points of Light Foundation. The Competencies for Managers of Volunteers of the Association of Volunteer Administration (AVA) came the closest to meeting the needs of the AmeriCorps program directors because that model is designed for practitioners in the field. This document is the result.

Assumption.
A fundamental assumption is that well prepared and competent Managers of Volunteers are essential to the success of a program, as described quantitatively and qualitatively and measured by the program's processes, outputs, outcomes, and impact on the community and clients it serves. Individual effectiveness is essential to organizational effectiveness.

Value of Volunteer Management.
The field of volunteer management lacks consistency and coordination. Some Managers of Volunteers are appointed to their positions with no experience as a supervisor or manager. Skills and experience of Managers of Volunteers vary greatly. Many report that what they know they 'picked up on the job'. The competence of the volunteer manager has a powerful effect on staff and volunteer morale, the work ethic of the organization, and the retention on the job. A competent volunteer manager sustains the program by providing rich, varied, useful experiences for volunteers that support the mission of organizations to meet the needs of the community.

Competencies Model.
In developing this model, we realized that these broad areas of responsibility are neither developmental nor hierarchical. Some people begin their careers in leadership and over time may acquire skills in management, supervision, or technology. Not all Managers of Volunteers need the skills in all of these categories, but most do. They are not developmental across categories, i.e. a volunteer manager may have considerable expertise in community leadership and may never need to acquire the skills of financial management. Certainly not all Managers of Volunteers start their career in the same place. AmeriCorps program directors, and many other Managers of Volunteers, require the full range of these competencies with at least an intermediate level of accomplishment.

Using this Document.
The material is organized so that the Competencies for Managers of Volunteers start with an overview of the broad categories of skills required of a typical volunteer manager. Then they move to increasing detail. Together these sections aid in understanding the broad categories of accomplishments that a volunteer manager must demonstrate, at the same time that they provide the detail necessary for a self-assessment or a professional development plan.

Competencies for Managers of Volunteers: Summary
The Summary page provides a brief overview. This section includes personal traits that are inherent in the individual, core competencies that affect a person's ability to learn and acquire

the skills and knowledge necessary to advance in their field. Three broad categories of skills required of Managers of Volunteers are: Supervision and Human Resources, Management and Operations, and Leadership. They include a broad range of skills from managing self, managing people, managing projects and programs, and leading organizations.

Competencies for Managers of Volunteers: Detail
The Detail section identifies the function that makes up the requirements of that process and provides a description of what that competency requires. The Detail section describes the Traits, Characteristics, and Core Competencies as well as breaking down the major categories of Supervision and Human Resources, Management and Operations, and Leadership.

Competencies for Managers of Volunteers: Novice to Expert
This section breaks competencies into steps that move the person along a continuum from Novice to Expert. The path from Novice to Expert is developmental in nature, in that the knowledge base required of a novice is essential to developing the more sophisticated skills, adaptation and advocacy required to become an expert. In developing the continuum for Novice to Expert, we relied on much of the work of the Equipped for the Future model from the National Institute for Literacy developed to document competencies in adult education.

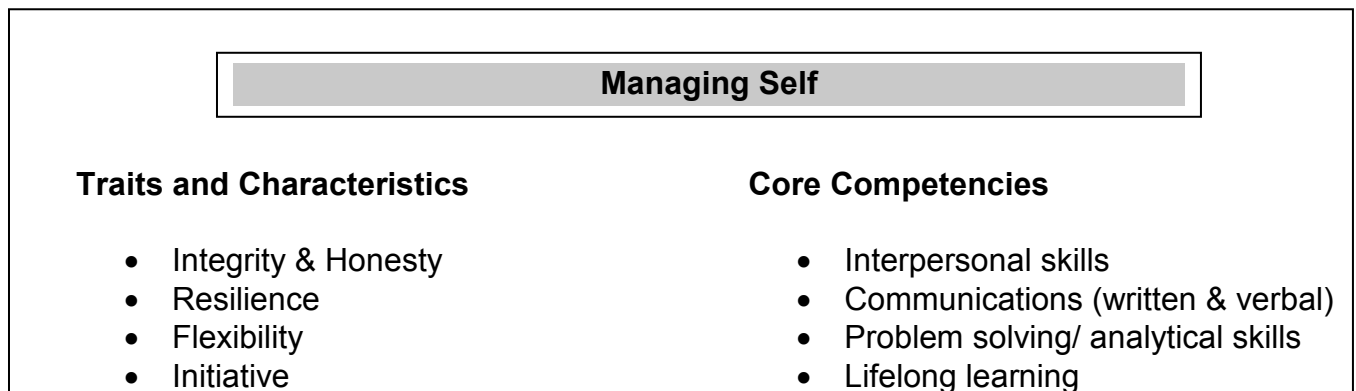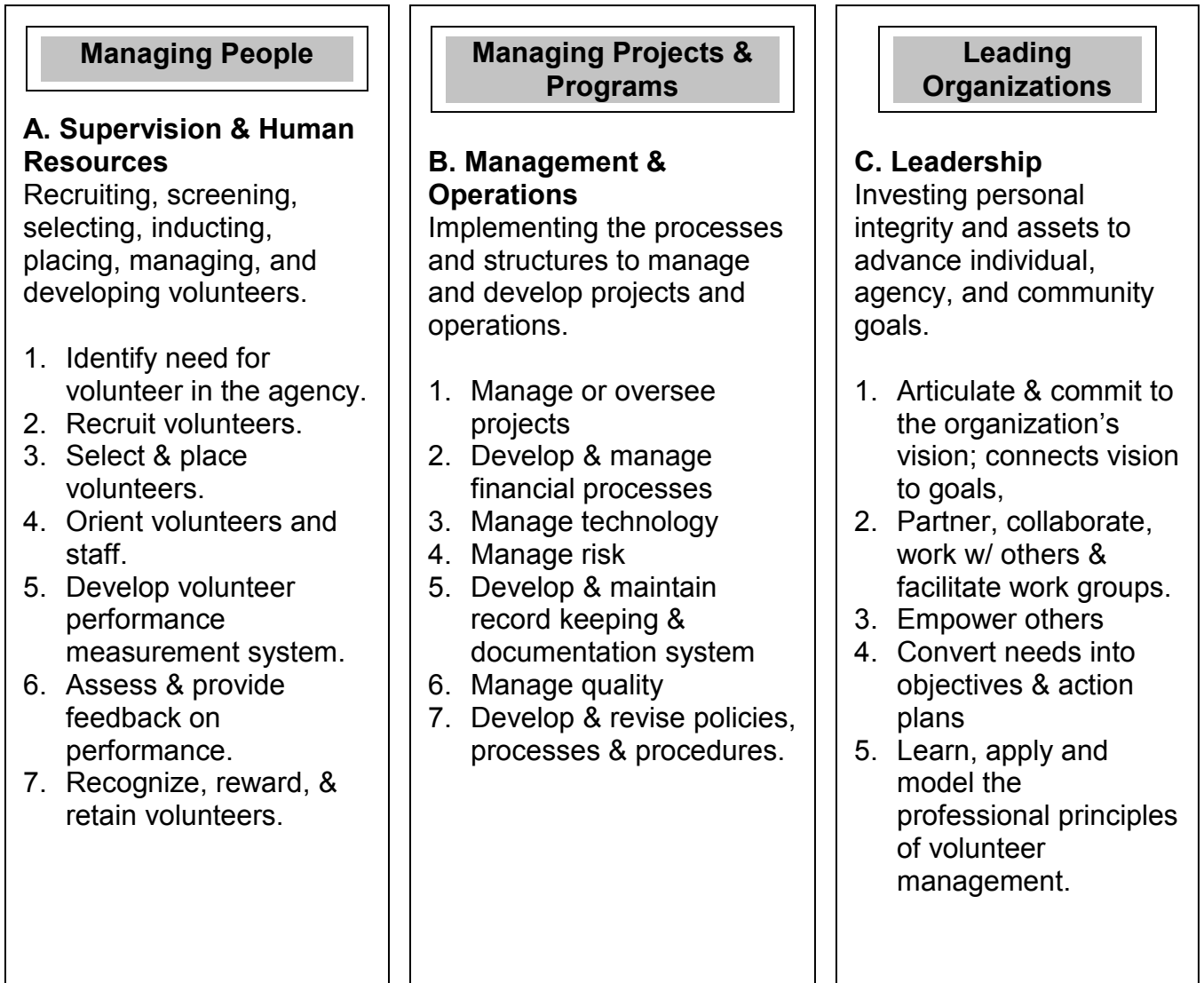**Competencies for Managers of Volunteers: Novice, Intermediate, Advanced, Expert**
This section separates out the competencies by skill level. This helps to create a tool that can be used to track accomplishments at each level.

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Competencies for Managers of Volunteers

Managing People

A. Supervision & Human Resources
Recruiting, screening, selecting, inducting, placing, managing, and developing volunteers.

1. Identify need for volunteer in the agency.
2. Recruit volunteers.
3. Select & place volunteers.
4. Orient volunteers and staff.
5. Develop volunteer performance measurement system.
6. Assess & provide feedback on performance.
7. Recognize, reward, & retain volunteers.

Managing Projects & Programs

B. Management & Operations
Implementing the processes and structures to manage and develop projects and operations.

1. Manage or oversee projects
2. Develop & manage financial processes
3. Manage technology
4. Manage risk
5. Develop & maintain record keeping & documentation system
6. Manage quality
7. Develop & revise policies, processes & procedures.

Leading Organizations

C. Leadership
Investing personal integrity and assets to advance individual, agency, and community goals.

1. Articulate & commit to the organization's vision; connects vision to goals,
2. Partner, collaborate, work w/ others & facilitate work groups.
3. Empower others
4. Convert needs into objectives & action plans
5. Learn, apply and model the professional principles of volunteer management.

Managing Self

Traits and Characteristics

- Integrity & Honesty
- Resilience
- Flexibility
- Initiative

Core Competencies

- Interpersonal skills
- Communications (written & verbal)
- Problem solving/ analytical skills
- Lifelong learning

Competencies for Managers of Volunteers

Managing Self	Understanding, accepting, and developing oneself with awareness, control, and confidence
Function	**Description**
Traits and Characteristics	Traits and characteristics are intrinsic to the individual, are a deep and enduring part of a person's personality, and are consistent and predictive of behavior across situations and experience.
• **Integrity & Honesty**	The quality of being reliable, ethical and truthful.
• **Resilience**	The quality of being able to rebound and withstand chronic or episodic stress or pressure.
• **Flexibility**	Ability to adjust, change, or reconsider actions or decisions.
• **Initiative**	The internal desire and ability to take the first step and originate action.
Core Competencies	Competencies are predictive of high performance, including an element of "intention" that causes action towards an outcome. They are consistent across the spectrum of a person's experience in their professional and personal life.
• **Interpersonal skills**	Cooperate and collaborate with others; resolve conflict and negotiate; advocate, influence and guide others.
• **Communications (written & verbal)**	Read with comprehension; convey ideas in writing; speak clearly and listen actively; observe critically.
• **Problem solving/ analytical skills**	Plan, analyze, and solve problems using a range of tools and data.
• **Lifelong learning**	Take responsibility for own learning, use information and communications technology; conduct research, reflect on and evaluate information, data, and resources.

Competencies for Managers of Volunteers

A. Supervision and Human Resources – Recruiting, screening, selecting, inducting, placing, managing, and developing volunteers.	
Function	**Description**
1. Identify need for volunteer in the agency.	Know agency's priorities, plans, customer/ client needs, and describe how volunteers will add value. Recognize and advocates for a designated manager/supervisor.
2. Recruit volunteers.	Use creative marketing & communication skills to identify targets, articulate opportunity, and provoke response.
3. Select & place volunteers.	Effectively use interviewing skills to elicit competencies. Use assessment skills to determine qualifications and suitability of applicant to assignment.
4. Orient volunteers and staff.	Deliver effective training for volunteer and staff, and include development opportunities for volunteer that require additional skills, knowledge, or abilities to perform service.
5. Develop performance measurement system	Link and document individual volunteer needs with organizational priorities, strategies, and operations. Use adult/youth development principles when supervising, training, and providing advancement opportunities for volunteers.
6. Assess & provide feedback to volunteer about performance	Establish a system and keep a schedule of performance review for volunteers. Identify and articulate performance expectations of volunteers, targeted outcome & output indicators, and give both positive and negative feedback, as necessary.
7. Recognize, reward, & retain volunteers.	Maintain communication and feedback loop with frequent and public praise as well as a detailed, quantifiable (if possible), and concrete report of accomplishments.

Function	Description
B. Management and Operations – Implementing the processes and structures to manage and develop projects and operations.	
1. Manage or oversee projects	Plan, document, implement, evaluate, train, and disseminate reports on work.
2. Develop & manage financial processes	Identify and obtain alternate sources of funding; develop & manage budget accounts for both cash and in-kind resources; pursue fiscal sustainability.
3. Manage technology	Identify, obtain, and apply technology that is useful for training, record keeping, finance, evaluation, analysis, and service delivery.
4. Manage risk	Apply knowledge of risk assessment, prevention, identification, and financing to risk avoidance, reduction, and control programs and crisis planning/management. Address tasks, individuals (volunteers and clients), environment, organization, and laws or regulations.
5. Develop & maintain record keeping & documentation system	Understand the relationship between maintaining sufficient documentation and managing risk. Use a documentation system for supervising volunteers and program impact/evaluation that is efficient, comprehensive and cost effective.
6. Manage quality	Apply principles of continuous quality improvement and quality assurance and quality control to ensure volunteer services are responsive, consistent, valued, and of high quality.
7. Develop & revise policies, processes & procedures as needed	Ensure that guidelines for program operations, volunteer assignments, and program staff reflect best practices of both volunteer administration and service sector (health, education, public safety, etc.). Integrate changes in service sector into volunteer roles, training, etc.

C. Leadership–Investing personal integrity and assets to advance individual, agency, and community goals	
Function	**Description**
1. Articulate & commit to the organization's vision and connects vision to goals	Hold a systems perspective, an awareness of community context, and a strategic outlook.
2. Partner, collaborate, work with others and facilitate work groups	Build coalitions; share leadership and resources; and establish strategic alliances with mutual organizational benefits.
3. Empower others	Share power & give up control; promote policies and procedures that incorporate cultural competency and disability inclusion; see mutual benefits from empowerment.
4. Convert needs into objectives and action plans	Implement planning tasks and balance with the details of accomplishing the work. Articulate connections, opportunities, and advantages for internal and external partners and program participants.
5. Learn, apply and model the professional principles of volunteer management	Inititate a self assessment plan for professional development, make opportunities for formal and nonformal learning, and support the advancement of the field of volunteer management.

Volunteer Management Competencies: Novice to Expert Continuum

A. SUPERVISION & HUMAN RESOURCES

Topic Skill Level	A. 1. Identify Need for Volunteers Indicators
"Novice" Acquire basic vocabulary and knowledge	☐ Know agency's priorities and plans ☐ Know customer/client needs ☐ Know how volunteers will add value
"Intermediate" Apply skills and knowledge	☐ Translate agency priorities and needs into goals/objectives for volunteers ☐ Design activities for volunteers to meet customer/client needs ☐ Create volunteer work plan
"Advanced" Plan, Do, Study, Adapt (PDSA)	☐ Adjust activities to maintain alignment with agency priorities ☐ Refine volunteer activities to reflect changing customer/client needs ☐ Adapt the volunteer work plan to reflect the skills and knowledge of individual volunteers
"Expert" Apply knowledge in a range of contexts	☐ Understand the context of the agency priorities and plans within the larger community ☐ Articulate the role of agency/members in addressing customer/client needs ☐ Think strategically about leveraging volunteer assets to benefit community and to create sustainability

A. 2. Introduction to "Recruit Volunteers" Section

Inclusive recruitment ideas:
One way to promote more diversity and inclusion within your volunteers' corps is to seek out individuals with disabilities for volunteer positions. Strategies to encourage people with disabilities to volunteer include recruiting directly from the disability community. The resources section about recruitment provides a variety of links to programs and services used by people with disabilities and contacting them will assist with outreach efforts. A related strategy involves developing contacts within the disability community and reaching out to potential volunteers through programs and services by utilizing their web sites and newsletters. Generate interest by highlighting positive experiences (brief stories and photos) that people with and without disabilities have had volunteering within your organization.

Clearly written position descriptions:
All volunteers and organizations benefit from clearly stated, well-written position descriptions. It is important for volunteers to know what is expected of them in their assignments. The resources in this section will assist managers of volunteers with writing position descriptions that indicate the required (essential) position functions as well as the preferred (marginal) functions. When position descriptions are vague (unclear) or contain wished for yet not required skills and competencies, qualified people may not apply. For example, if completion of two years of college is a requirement for holding a position, include this in the position description as a requirement/essential function. However, if two years of college is preferred (helpful, but not necessary), then do not list it as a requirement for the position.

Additionally, consider performing a task analysis for the position as a way to distill out specific activities the person will be doing. The resources section includes a link about how to conduct a task analysis.

Being flexible and adaptable:
Volunteers come with a vast array of talents and individual reasons for volunteering. Experienced managers of volunteers use strategies to match the skill sets of their volunteers with the tasks and activities which need to be carried out. The Active Living Alliance of Canada has created a valuable resource available in PDF, *Teaching Strategies to Promote Inclusion,* to help volunteer managers think through how they may adapt activities and increase involvement by individuals with different abilities. This resource provides information about how to modify activities and discusses nine types of possible adaptations.
http://www.ilcanada.ca/upload/documents/TeachingStrategies.pdf

A. SUPERVISION AND HUMAN RESOURCES

Topic Skill Level	A. 2. Recruit Volunteers Indicators
"Novice" Acquire basic vocabulary and knowledge	☐ Know what the volunteer is going to do * ☐ Able to create coherent statement of agency priorities/policies and client/customer needs ☐ Identify appropriate sources of volunteers *
"Intermediate" Apply skills and knowledge	☐ Create a position description * ☐ Write a customized advertisement that attracts potential applicants ☐ Identify and uses appropriate channels for outreach *
"Advanced" Plan, Do, Study, Adapt (PDSA)	☐ Able to 'sell' the position to applicants ☐ Willing to adapt expectations to balance agency plans/client needs to strengths of the individual applicants * ☐ Analyze effectiveness of recruiting strategies and make appropriate changes
"Expert" Apply knowledge in a range of contexts	☐ Recognize the strengths of applicants and refer to other programs when relevant ☐ Use expanded networks to make connections outside of traditional channels

* Relevant resources and/or websites pertaining to this indicator are provided in the corresponding Appendix A. 2. Resources Section.

A. 3. Introduction to "Select and Place Volunteers" Section

Making your materials accessible:
There are materials in the resources section to assist volunteer managers with creating accessible documents and other information. Many people with and without disabilities use a variety of methods for accessing information online. It is important for volunteer programs to ensure that the information they provide to the public is created in ways which allow for access by people who use assistive devices such as screen readers. One resource, *Effective Communication, Alternative Formats and Web Accessibility*, is a free online course available through the Corporation for National and Community Service web site. Individuals will need to create a username and password to access this free course.

It is also important to be aware of other possible barriers such as people whose first language is not English, people with low literacy or writing skills. Additional information on this topic is located in a publication from the Institute for Community Inclusion, *Access for All Customers: Universal Strategies for One-Stop Career Centers*. The information provided in this publication is readily adaptable to volunteer opportunities.

Interviewing and reasonable accommodations:
Resources in this section provide assistance to volunteer managers regarding the interview process and the provision of reasonable accommodations to qualified individuals with disabilities. Specifics such as how to respond to a request for reasonable accommodation and questions to ask (and avoid) in the interview process are covered.

Motivation to volunteer:
People with disabilities desire to be part of their communities and volunteering is a great way to become involved and actively participate in one's community. For a number of people with disabilities, becoming a volunteer may be an initial step on the road to one day becoming employed. Volunteering provides the same benefits to people with and without disabilities and resources in this section highlight what motivates people to volunteer.

A. SUPERVISION AND HUMAN RESOURCES

Topic Skill Level	A. 3. Select and Place Volunteers Indicators
"Novice" Acquire basic vocabulary and knowledge	☐ Create an application form * ☐ Able to identify relevant competency-based screening questions ☐ Able to distinguish between required and preferred qualifications and skills *
"Intermediate" Apply skills and knowledge	☐ Develop a protocol for screening that includes application, interview, background checks, and other tools * ☐ Design a scoring mechanism for assessing applications ☐ Assess applications and interviews with both quantitative and qualitative data
"Advanced" Plan, Do, Study, Adapt (PDSA)	☐ Match skill sets with position descriptions and/or placement site * ☐ Negotiate agreement with volunteer regarding positions descriptions/expectation and placement ☐ Include all relevant people in the decision-making process ☐ Develop a decision-making protocol for assigning and placing volunteers
"Expert" Apply knowledge in a range of contexts	☐ Understand the motivations of volunteers (demographics, life stages, age etc.) * ☐ Match motivations of volunteers to requirements of placement site ☐ Articulate reasons for selection or not of volunteers based on selection criteria

* Relevant resources and/or websites pertaining to this indicator are provided in the corresponding Appendix A. 3. Resources Section.

A. 4. Introduction to "Orient Volunteers and Staff" Section

Orientation:
Information in this section will aid managers of volunteers in planning ahead for meetings and training sessions. Resources include a Department of Justice publication, *Accessible Information Exchange: Meeting on a Level Playing Field*. Topics covered include meeting room accessibility, information accessibility and communication accessibility.   Additional resources such as, *What is an Inclusive Service Environment?* from the National Service Inclusion Program (NSIP), Institute for Community Inclusion, University of Massachusetts, Boston, provides recommendations for how to become an inclusive environment that welcomes diverse populations.

Planning resources:
Inclusion of Persons With Disabilities in Service Days and Events is a planning resource developed by the Points of Light Foundation. Many of the suggestions and ideas in the document are applicable beyond planning for individual service days and events. The importance of including people with disabilities in the planning process is highlighted, as well as meeting in accessible locations and forging partnerships with people with disabilities and the organizations which support them.

A. SUPERVISION AND HUMAN RESOURCES

Topic Skill Level	A. 4. Orient Volunteers and Staff Indicators
"Novice" Acquire basic vocabulary and knowledge	☐ Provide initial orientation for volunteer and staff to activities and work plan * ☐ Provide orientation to worksite, including formal and informal networks and structures * ☐ Introduce relevant policies and procedures ☐ Explain organizational lines of reporting and authority
"Intermediate" Apply skills and knowledge	☐ Develop volunteer handbook ☐ Develop orientation checklist * ☐ Develop packet of materials from sites ☐ Involve site supervisor in orientation
"Advanced" Plan, Do, Study, Adapt (PDSA)	☐ Gather feedback from volunteers and sites regarding adequacy and relevance of orientation ☐ Analyze feedback ☐ Provide training for site supervisors on volunteer management
"Expert" Apply knowledge in a range of contexts	☐ Adapt orientation materials to reflect feedback ☐ Maintain ongoing relationship with site supervisor to discuss mutual expectations, problems, and performance

* Relevant resources and/or websites pertaining to this indicator are provided in the corresponding Appendix A. 4. Resources Section.

A. 5. Introduction to "Develop Performance Management System" Section

Evaluating volunteers:
Evaluating performance is an important function for managers of volunteers. Recommendations and guidance about evaluation procedures and the Americans with Disabilities Act (ADA) are provided in this section. Resources in this section include, *The ADA: Applying Performance and Conduct Standards to Employees with Disabilities*. The information in this section will help managers understand for example, situations where a performance issue is due to an ineffective accommodation as compared to a poorly performing volunteer who may also be a person with a disability. The intent of the resources in this section is to assist managers of volunteers untangle potential performance problems from disability and their responsibility for provision of reasonable modifications.

A. SUPERVISION AND HUMAN RESOURCES

Topic	A. 5. Develop Performance Measurement System
Skill Level	**Indicators**
"Novice" Acquire basic vocabulary and knowledge	*For the person:* ☐ Create a performance appraisal form * ☐ Create and use a timesheet for tracking hours *For the work:* ☐ Create a tracking tool to measure activities ☐ Learn and apply principles of youth/adult learning and development
"Intermediate" Apply skills and knowledge	*For the person:* ☐ Collect data on a regular basis regarding the personal performance of the volunteer *For the work:* ☐ Collect data on a regular basis regarding activities and the work plan
"Advanced" Plan, Do, Study, Adapt (PDSA)	*For the person:* ☐ Analyze the performance data of the volunteer ☐ Develop member development plan that incorporates interests of the volunteer and the priorities of the organization ☐ Provide opportunities for a variety of experiences and assignments *For the work:* ☐ Analyze the data from volunteer activities ☐ Look for trends and patterns that reflect the continuous improvement of the work
"Expert" Apply knowledge in a range of contexts	*For the person:* ☐ Adapt activities of the volunteer to reflect the skills and motivation of the volunteer *For the work:* ☐ Align the value added by volunteer to agency goals, mission and vision

* Relevant resources and/or websites pertaining to this indicator are provided in the corresponding Appendix A. 5. Resources Section.

A. 6. Introduction to "Assess and Provide Feedback on Performance" Section

Communication and feedback:
What happens when a volunteer is not performing tasks up to the standards needed? How can managers of volunteers intervene to find out why difficulties are occurring? What if the volunteer is a person with a disability and the volunteer manager is not sure how to proceed? Resources in this section will help managers of volunteers determine appropriate next steps.

Best practice for most volunteer sites involves evaluation of volunteers and this includes volunteers with disabilities. Keys to success for any evaluation process include setting clear performance standards, consistent application of the standards and the use of modifications/accommodations to assist in meeting the standards by volunteers who have a disability. The PowerPoint presentation from the Job Accommodation Network (JAN), *Supervising Service Members and Volunteers with Disabilities* is a helpful resource in this area.

An additional resource from JAN, *The Interactive Process*, includes guidance about working with volunteers with disabilities to determine if there is a modification to a policy, practice or procedure or an auxiliary aid or service that will support the person to perform the volunteer duties to the organizations performance standards.

A Managers Guide to Communication is an additional communication-related resource which provides numerous tips and pointers in an engaging and easy to understand format.

A. SUPERVISION AND HUMAN RESOURCES

Topic Skill Level	A. 6. Assess and Provide Feedback on Performance Indicators
"Novice" Acquire basic vocabulary and knowledge	☐ Knowledge of basic supervisory principles (e.g. communication, setting clear expectations, listening skills, coaching skills, goal setting, providing feedback) * ☐ Identify and articulate performance expectations * ☐ Understand the concept of progressive discipline and grievance procedures
"Intermediate" Apply skills and knowledge	☐ Communicate regularly with volunteers * ☐ Assess performance and personal skills and work products * ☐ Provide positive and negative feedback based on performance expectations ☐ Develop corrective action plan if necessary, based on progressive discipline procedure * ☐ Provide written evaluation for records
"Advanced" Plan, Do, Study, Adapt (PDSA)	☐ Analyze results of performance assessment ☐ Create individual training and development plan that reflects the goals and values of both volunteer and agency ☐ Manage and resolve conflicts
"Expert" Apply knowledge in a range of contexts	☐ Anticipate potential problems or opportunities for volunteers and sites ☐ Identify potential volunteers for different assignments ☐ Articulate impact and value of the individual's contribution to the work of the agency, the community and the individual ☐ Responsible for human resources decisions (e.g. hiring, leave requests, terminating)

* Relevant resources and/or websites pertaining to this indicator are provided in the corresponding Appendix A. 6. Resources Section.

A. 7. Introduction to "Recognize, Reward and Retain Volunteers" Section

Recognition of volunteers:
It has been said that recognition is not an event, it's an attitude. How do managers of volunteers and organizations recognize, thank and further inspire their volunteers? The Volunteer Canada web site in the resources section includes recognition guidelines as well as helpful hints.

Retention of volunteers:
Explore the skills and experiences of managers of volunteers who have examined factors linked to volunteers continuing with projects for extended periods of time. The Corporation for National and Community Service Resource Center web site has an entire section dedicated to retention of volunteers.

A. SUPERVISION AND HUMAN RESOURCES

Topic Skill Level	A. 7. Recognize, Reward, and Retain Volunteers Indicators
"Novice" Acquire basic vocabulary and knowledge	☐ Know a range of methods, tools and tangible rewards for recognizing the work of volunteers. * ☐ Ensure that volunteers are kept informed of the work of the agency ☐ Provide frequent formal and informal recognition for work of volunteers ☐ Understand the roles and relationships of volunteers and staff
"Intermediate" Apply skills and knowledge	☐ Maintain communication with volunteer and staff regarding assignment and personal satisfaction ☐ Establish an ongoing feedback loop where specific information is shared in an open, informal setting
"Advanced" Plan, Do, Study, Adapt (PDSA)	☐ Adapt the workplan based on feedback from volunteer, the supervisor, and the agency. * ☐ Adjust the reward and recognition to reflect the motivation of the volunteer ☐ Reflect the values and culture of the sponsoring agency in any recognition and reward plan
"Expert" Apply knowledge in a range of contexts	☐ Identify and adjust the work of volunteers to reflect their changing motivations of volunteer and the evolving needs of the agency. ☐ Manage the mutual responsibilities and expectations of both volunteers and staff.

* Relevant resources and/or websites pertaining to this indicator are provided in the corresponding Appendix A. 7. Resources Section.

B. MANAGEMENT AND OPERATIONS

Topic Skill Level	B. 1. Manage or oversee projects Indicators
"Novice" Acquire basic vocabulary and knowledge	☐ Follow an established protocol for a project ☐ Conduct a project ☐ Document outcomes using a template ☐ Count the outputs
"Intermediate" Apply skills and knowledge	☐ Identify need for project ☐ Develop relevant activities or interventions to meet the need ☐ Plan, design, and conduct a project ☐ Create objectives and measures to gauge the success of the project
"Advanced" Plan, Do, Study, Adapt (PDSA)	☐ Analyze processes and outcomes ☐ Adjust project or program activities as a result of analysis ☐ Undertake new projects or activities to reflect learning from project evaluation
"Expert" Apply knowledge in a range of contexts	☐ Align activities and projects with agency mission and goals ☐ Leverage activities and projects to strengthen the sponsoring organization ☐ Disseminate information about project results to intern and external stakeholders ☐ Replicate and adapt project to new settings

B. 2. Introduction to "Develop and Manage Financial Operations" Section

Rationale for accommodations line in budget:
Planning ahead and thinking about potential costs for provision of accommodations demonstrates commitment to disability inclusion. Resources in this section provide sample language for a budget narrative and related recommendations. Many accommodations may be provided inexpensively and being ready to provide them sends a powerful message to volunteers with disabilities. Additionally, assistance with provision of accommodations may be possible through contact with many of the organizations and programs found throughout the resources sections.

B. MANAGEMENT AND OPERATIONS

Topic Skill Level	B. 2. Develop and Manage Financial Processes Indicators
"Novice" Acquire basic vocabulary and knowledge	☐ Understand laws regulating nonprofit financial management ☐ Monitor expenditures against a program specific budget ☐ Know the financial sources of program support ☐ Understand In Kind Contributions ☐ Document reporting and tracking of expenditures
"Intermediate" Apply skills and knowledge	☐ Apply laws regulating nonprofit financial management ☐ Develop a rudimentary budget by connecting program goals and activities to anticipated expenses ☐ Know essential cost elements of program operations *
"Advanced" Plan, Do, Study, Adapt (PDSA)	☐ Analyze trends of budget and expenditures ☐ Adapt spending patterns to reflect budgetary realities ☐ Identify and obtain alternate sources of funding ☐ Develop a comprehensive budget in compliance with federal, state or private grant guidelines
"Expert" Apply knowledge in a range of contexts	☐ Advocate for adequate funding to support continued viability of volunteer management program ☐ Justify the value added of the volunteer program in terms of the expenditure required to maintain a quality program ☐ Pursue financial sustainability

* Relevant resources and/or websites pertaining to this indicator are provided in the corresponding Appendix B. 2. Resources Section.

B. MANAGEMENT AND OPERATIONS

Topic	B. 3. Manage technology
Skill Level	**Indicators**
"Novice" Acquire basic vocabulary and knowledge	☐ Facility with basic computer technology (e.g. word processing, spreadsheet, database, email and internet) ☐ Capable of record keeping for volunteer management
"Intermediate" Apply skills and knowledge	☐ Use technology to document volunteer activities such as training, service delivery and monitoring (e.g. web based reporting systems, eGrants, volunteer management software)
"Advanced" Plan, Do, Study, Adapt (PDSA)	☐ Analyze trends resulting from data collected using computer software and web based tools ☐ Adapt computer tools and applications to meet needs of the program
"Expert" Apply knowledge in a range of contexts	☐ Identify, obtain and apply appropriate technology to manage volunteers and the program

B. MANAGEMENT AND OPERATIONS

Topic Skill Level	B. 4. Manage risk Indicators
"Novice" Acquire basic vocabulary and knowledge	☐ Understand laws regarding volunteer liability ☐ Identify existing risk management policies in agency, program, and placement site ☐ Understand key elements of risk management (avoidance, prevention, reduction, and control) ☐ Implement process of risk assessment
"Intermediate" Apply skills and knowledge	☐ Assess for consistency the risk management policies of agency, program, and placement site ☐ Assess adequacy of insurance products (workers compensation, health insurance, general liability and vehicle insurance) ☐ Anticipate potential risks for program, volunteers, and beneficiaries ☐ Ensure that volunteers have adequate protection against potential risks
"Advanced" Plan, Do, Study, Adapt (PDSA)	☐ Develop a crisis management plan that reflects a trend analysis of reasonable risks associated with the program and the volunteers ☐ Analyze the gaps in coverage and likelihood of occurrence of potential risks of managing a volunteer program
"Expert" Apply knowledge in a range of contexts	☐ Implement a crisis management plan ☐ Adapt and align risk management policies and procedures between the program/project and the agency ☐ Advocate for supporting the risk management planning and implementation in the agency

B. MANAGEMENT AND OPERATIONS

Topic	B. 5. Develop & maintain record keeping & documentation system
Skill Level	**Indicators**
"Novice" Acquire basic vocabulary and knowledge	☐ Use a record keeping system that documents activities and progress towards goals ☐ Compile data in response to program requirements
"Intermediate" Apply skills and knowledge	☐ Understand a performance measurement system for assessing program results ☐ Understand the relationship between maintaining sufficient documentation and managing risk
"Advanced" Plan, Do, Study, Adapt (PDSA)	☐ Understand the logic model as a tool for managing program activities and linking to program outcomes ☐ Analyze the validity of program activities ☐ Develop a cost effective and comprehensive documentation system that facilitates compliance and provides meaningful results
"Expert" Apply knowledge in a range of contexts	☐ Design program evaluation based on desired outcomes of the program ☐ Adapt program design to reflect outcomes of performance measurement data and program evaluation ☐ Articulate and communicate benefits of program activities to internal and external stakeholders

B. MANAGEMENT AND OPERATIONS

Topic	B. 6. Manage quality
Skill Level	**Indicators**
"Novice" Acquire basic vocabulary and knowledge	☐ Comply with requirements imposed by agency and professional standards ☐ Recognize qualitative and quantitative data that provides valuable information about program value ☐ Understand vocabulary and tools for quality management (e.g. TQM Total Quality Management, and Continuous Quality Improvement)
"Intermediate" Apply skills and knowledge	☐ Describe the process for gathering data and assessing outcomes ☐ Recognize the components of quality service (i.e. Is the service responsive to community need? Do key stakeholders value it? Is it consistently delivered? Does it go beyond minimum standards?)
"Advanced" Plan, Do, Study, Adapt (PDSA)	☐ Identify cause and effect relationships in processes related to managing operations ☐ Analyze results to identify where change needs to be made or to build on success
"Expert" Apply knowledge in a range of contexts	☐ Adapt processes or operating procedures to reflect the results of the analysis ☐ Align and adapt processes to ensure that quality criteria are met or exceeded

B. MANAGEMENT AND OPERATIONS

Topic	B. 7. Develop and revise policies, processes, and procedures
Skill Level	**Indicators**
"Novice" Acquire basic vocabulary and knowledge	☐ Know current policies, processes, and procedures for the program, agency and placement site ☐ Identify sources of information for samples or templates for policies, processes, and procedures
"Intermediate" Apply skills and knowledge	☐ Develop relevant policies, processes, and procedures to reflect volunteer and program activities ☐ Develop policies, processes, and procedures that incorporate the changing profile of the volunteer pool (i.e. Baby Boomers, persons with disabilities)
"Advanced" Plan, Do, Study, Adapt (PDSA)	☐ Analyze policies, processes, and procedures to meet the standard of best practices in the field of volunteer management
"Expert" Apply knowledge in a range of contexts	☐ Ensure that policies, processes, and procedures of the volunteer management program are aligned with those of the program, agency and placement site.

C. LEADERSHIP

Topic Skill Level	C. 1. Articulate & commit to the organization's vision; connect vision to goals Indicators
"Novice" Acquire basic vocabulary and knowledge	☐ Know how the project contributes to the vision and goals of the agency ☐ Aware of the community, political and cultural context of the project ☐ Hold a perspective about the larger vision of the agency's view of the future ☐ Know the elements of strategic planning
"Intermediate" Apply skills and knowledge	☐ Integrate the priorities of the agency into the work of the project ☐ Create and implement the work within the context of the agency vision ☐ Incorporate principles of cultural diversity into planning and operations.
"Advanced" Plan, Do, Study, Adapt (PDSA)	☐ Recognize and marshal resources required for project success ☐ Anticipate obstacles to project success ☐ Adapt the project to reflect changing goals within the organization's vision
"Expert" Apply knowledge in a range of contexts	☐ Understand the context of the agency within the larger community ☐ Articulate the role of the agency in addressing community needs ☐ Think strategically about leveraging assets to benefit community and to create sustainability ☐ Advocate for the project or agency in various community settings

C. LEADERSHIP

Topic	C. 2. Partner, collaborate, work with others and facilitate work groups
Skill Level	**Indicators**
"Novice" Acquire basic vocabulary and knowledge	☐ Know the principles of group dynamics ☐ Understand the principles of adult learning ☐ Know the basics of meeting management
"Intermediate" Apply skills and knowledge	☐ Take responsibility and follow through with requests, promises, opportunities ☐ Run groups, teams, and meetings ☐ Participate as a resource in working with others ☐ Share leadership and resources
"Advanced" Plan, Do, Study, Adapt (PDSA)	☐ Develop a network of peers in the community ☐ Participate in ad hoc and formal coalitions ☐ Play a leadership role in community-based work groups
"Expert" Apply knowledge in a range of contexts	☐ Make presentations and conduct training at meetings and conferences ☐ Establish strategic alliances within the larger community ☐ Demonstrate leadership within the field of nonprofit management ☐ Use appropriate political processes to accomplish project or agency goals

C. LEADERSHIP

Topic	C. 3. Empower others
Skill Level	**Indicators**
"Novice" Structure of Knowledge Base	☐ Recognize the difference between empowering and abdicating power ☐ Provide coaching and support while holding others responsible for results ☐ Able to assert personal experience and point of view ☐ Know the definitions and implications of disability and cultural competency
"Intermediate" Fluency of Performance	☐ Value the assets and perspective of community members ☐ Articulate mutual expectations of project or goal ☐ Build relationship with other people ☐ Create an inclusive project environment for people with disabilities that reflects cultural competency
"Advanced" Independence of Performance (PDSA) (Plan, Do, Study, Adapt)	☐ Analyze goals and objectives in collaboration with community partners ☐ Demonstrate flexibility in ability to adjust and meet multiple needs and priorities ☐ Acknowledge and incorporate assets of others ☐ Provide reasonable accommodations for those with disabilities ☐ Adapt projects to incorporate cultural diversity and people with disabilities
"Expert" Range of Conditions (Context)	☐ Open to working in collaboration with others ☐ Build coalitions and partnerships based on knowledge and experience within the community ☐ Articulate the value of working with others for mutual community benefit ☐ Actively engage people from different cultures and those with disabilities in volunteer work and community service

C. LEADERSHIP

Topic	C. 4. Convert Needs into Objectives and Action Plans
Skill Level	**Indicators**
"Novice" Acquire basic vocabulary and knowledge	☐ Know basic principles of logic models for measuring outcomes ☐ Know how to develop performance measures
"Intermediate" Apply skills and knowledge	☐ Develop a work plan (e.g. activity, how accomplished, time line, who's responsible) ☐ Identify indicators and create instruments to provide relevant process and outcome data ☐ Implements the program objectives and action plans
"Advanced" Plan, Do, Study, Adapt (PDSA)	☐ Collect, aggregate, and analyze the data ☐ Adjust objectives, action plans, and processes to reflect the results of data analysis ☐ Implement revised program based on data analysis
"Expert" Apply knowledge in a range of contexts	☐ Articulate connections, opportunities, and advantages for internal and external partners and program participants.

C. LEADERSHIP

Topic	C. 5. Learn, apply, and model the professional principles of volunteer management
Skill Level	**Indicators**
"Novice" Acquire basic vocabulary and knowledge	☐ Able to identify professional strengths and weaknesses ☐ Able to develop a self improvement plan ☐ Know the formal organizational structure for volunteer management
"Intermediate" Apply skills and knowledge	☐ Participate in relevant professional development in formal and non-formal educational settings ☐ Incorporate changes resulting from educational programs into volunteer management practices ☐ Access resources related to volunteer management practices
"Advanced" Plan, Do, Study, Adapt (PDSA)	☐ Recognize the value of role of volunteer manager ☐ Develop a professional network and participate with others in promoting the field ☐ Share best practices developed resulting from experience ☐ Seek professional credentials that acknowledge their work as volunteer managers
"Expert" Apply knowledge in a range of contexts	☐ Demonstrate conceptual knowledge of the role of volunteer management within the nonprofit world ☐ Articulate the importance of the profession of volunteer manager to the agency and the community ☐ Mentor other volunteer managers ☐ Advocate for the advancement of the field of volunteer management

Appendices
(Resources)

Appendix A. 2. - Resources

<u>NOVICE</u>

☐ **Know what the volunteer is going to do** **Return to A. 2. Indicators**

1. Volunteer Task Analysis (Word document) was adapted from the Corporation for National and Community Service Resource Center. It provides questions to assist in determining how project activities are carried out.

2. The Corporation for National & Community Service online resource, *Writing Inclusive Service Descriptions* provides useful pointers about writing inclusive position descriptions. Examples of essential and marginal functions are shared as well as information about qualifications.

☐ **Identify appropriate sources of volunteers** **Return to A. 2. Indicators**

1. Services and products are marketed to include individuals with disabilities:

   The U.S. Department of Labor, Office of Disability Employment Policy (ODEP). The Campaign for Disability Employment is a collaborative effort between several disability and business organizations that seek to promote positive employment outcomes for people with disabilities by encouraging employers and others to recognize the value and talent they bring to the workplace by fully including people with disabilities at work.

   The Campaign's *What Can You Do? Outreach Toolkit* includes discussion guides and video clips that may be used to explore experiences of disability. The materials are readily adaptable for discussion about volunteering, although they were initially developed for paid employment situations.

2. Aware of disability-related organizations in Maine:

   The State of Maine hosts a web portal with a comprehensive list of Disability Resources, about many supports and services that may assist individuals with disabilities, their families and their friends. Topics include accessible recreation, arts and leisure; employment and education; independent living; state programs; and technology and communication.

   Access Maine provides links to numerous web sites with information about programs, projects and resources to assist individuals with disabilities.

[Ability Maine](#) is a place for collecting and sharing information and opinions about living with disabilities. Our intent is to provide a place on the web for people to get information that will help them create better lives for themselves and others.

INTERMEDIATE

☐ **Create a position description** **Return to A. 2. Indicators**

1. This Corporation for National and Community Service link http://www.serviceandinclusion.org/ttt/node/80 provides helpful information about writing inclusive position descriptions and will help staff compose focused and complete position descriptions. A worksheet with specific questions is also included.

☐ **Identify and uses appropriate channels for outreach** **Return to A. 2. Indicators**

1. Create e-lists using web-based contacts in Maine to reach out to organizations that support/provide services to individuals who have disabilities. Seek out service providers in your regional area to improve outreach efforts:

   [Ability Maine](#) is a place for collecting and sharing information and opinions about living with disabilities. Our intent is to provide a place on the web for people to get information that will help them create better lives for themselves and others.

   Since 1978, [Alpha One](#), Maine's Center for Independent Living, has enabled thousands of people with disabilities to live more fully and more independently in all aspects of their lives.

   The [Autism Society of Maine](#) is a non-profit organization that serves individuals with autism and their families, professionals, and communities.

   [Easter Seals of Maine](#) provides exceptional services to ensure that all people with disabilities or special needs and their families have equal opportunities to live, learn, work and play in their communities.

   The [Learning Disabilities Association of Maine](#) is the Maine state affiliate of LDAA serving children and adults with specific learning disabilities, their families, professionals, and community members since 1980.

[Goodwill Industries of Northern New England](#) engages the human potential and enriches the quality of life within our communities by eliminating barriers to opportunity and to independence.

[The Iris Network](#) helps people who are visually impaired or blind attain independence and community integration.

The [Maine Center on Deafness](#) is a 501(c) (3) not-for-profit organization that serves people in Maine who are D/deaf, hard of hearing or late deafened.

[Amistad](#) began in 1982, started by families of adults with severe and persistent mental illness. In the past few years, Amistad has become a leader in developing services that are organized and delivered by peers.

[Maine Mental Health Connections, Inc](#). offers a variety of social, recreational, residential, vocational, and personal growth opportunities for adult consumers of mental health and/developmental services.

 http://www.abilitymaine.org/resource/melinks.html Maine-specific resources from the [Ability Maine](#) web site.

2. This online resource, *[Employing Ten Outreach Strategies when Recruiting Individuals with Disabilities](#)* from the Corporation for National & Community Service Resource Center includes a number of concrete suggestions to enhance outreach efforts and promote collaboration between programs seeking volunteers and people with disabilities.

ADVANCED

☐ **Willing to adapt expectations to balance agency plans/client needs to strengths of the individual applicants**   Return to A. 2. Indicators

1. This online resource, "*[Overcoming Barriers and Creating Opportunities for People with Developmental Disabilities in National Service Programs](#)*," from the Corporation for National & Community Service Resource Center, provides guidance about including people with developmental disabilities in service programs. Links to additional resources are included.

2. The *Teaching Strategies to Promote Inclusion* (PDF) from the [Active Living Alliance of Canada](#) provides a nine-step process for adapting activities and includes examples for each step.

Appendix A. 3. - Resources

NOVICE

☐ **Create an application form**   Return to A. 3. Indicators

1. The link below provides access to a free online course resource about Effective Communication, Alternative Formats and Web Accessibility through the CNCS Resource Center. Individuals will need to create a username and password to access this free course. http://www.nationalserviceresources.org/online-courses/effective-communication-alternative-formats-and-web-accessibility

2. An online resource, Recruiting Members with Disabilities and Using an Inclusive Application Process, provides information that will assist managers of volunteers in the process if recruiting and interviewing interested volunteers with disabilities. http://www.nationalserviceresources.org/practices/17127

3. The National Institute on Aging offers a tip sheet in PDF, *Making Your Printed Health Materials Senior Friendly (*2008). Marketed to those who work with seniors, this information-packed document provides tips and pointers beneficial to a wider audience that includes people with disabilities of all ages.

4. The Maine Department of Education's Maine CITE program is the statewide organization designed to help make assistive and universally designed technology more available to Maine citizens who need them. MaineCITE's online resource, *Accessible Documents,* provides information about common office documents and accessibility.

5. The Disability Funders Network, a national membership and philanthropic advocacy organization, provides an online resource, *Alternate Formats for Printed Materials*: http://www.disabilityfunders.org/alternat.

☐ **Able to distinguish between required and preferred qualifications and skills**   Return to A. 3. Indicators

1. The Corporation for National & Community Service resource, *Writing Inclusive Service Descriptions* (Word), provides useful pointers about writing inclusive position descriptions. Examples of essential and marginal functions are shared as well as information about qualifications.

INTERMEDIATE

☐ **Develop a protocol for screening that includes application, interview, background checks, and other tools** Return to A. 3. Indicators

   1. The ASSET AmeriCorps Program-Easter Seals in Central Texas offers this resource, *Helpful Suggestions from the ASSET*AmeriCorps Program*, which provides their "top five considerations" to create inclusive volunteering opportunities which include areas such as interviewing, reasonable accommodation and several others.

   2. This National Service Inclusion Project Fact Sheet in PDF, *Five Practical Tips for Providing and Maintaining Effective Reasonable Accommodations*, offers guidance for providing and maintaining reasonable accommodations for service members and volunteers with disabilities.

   3. Sample recruitment process document provides the steps needed to carry out volunteer recruitment from position descriptions to hiring.

ADVANCED

☐ **Match skill sets with position descriptions and/or placement site**
<div align="right">Return to A. 3. Indicators</div>

   1. The *Teaching Strategies to Promote Inclusion* (17-page PDF) from the Active Living Alliance of Canada provides a nine-step process for adapting activities and includes examples for each step.

EXPERT

☐ **Understand the motivations of volunteers (demographics, life stages, age etc.).** Return to A. 3. Indicators

   1. What Motivates People to Volunteer?

   2. Why People Volunteer (26-page PDF)

Appendix A. 4. - Resources

NOVICE

☐ **Provide initial orientation for volunteer and staff to activities and work plan.**   Return to A. 4. Indicators

1. *Accessible Information Exchange: Meeting on a Level Playing Field,* an 18-page PDF produced by the US Department of Justice, provides helpful information about a variety of accessibility considerations.

2. CNCS Resource Center website provides a number of helpful tips through the Elements of an Orientation page.
   http://encorps.nationalserviceresources.org/mo_orientation.php

3. Preparing Your Organization to Engage People with Disabilities includes resource ideas and checklists to encourage involvement and inclusion of people with disabilities.
   http://www.nationalserviceresources.org/practices/17466

4. What Is An Inclusive Service Environment? This excerpt from the Corporation for National & Community Service PDF publication, *Creating an Inclusive Environment: A Handbook for the Inclusion of People with Disabilities in National and Community Service Programs* (2004), provides a clear statement about the ongoing process of becoming an inclusive service environment.

☐ **Provide orientation to worksite, including formal and informal networks and structures.**   Return to A. 4. Indicators

1. The U.S. Department of Justice 18-page PDF, *Accessible Information Exchange: Meeting on a Level Playing Field*, provides information about a variety of topics including accessible meeting locations, room set up and presentation of meeting content.

2. *Access for All Customers: Universal Strategies for One-Stop Career Centers* – Institute Brief Issue No. 26, January 2009, an 8-page PDF from the Institute for Community Inclusion, UMass Boston, introduces the principles of universal design and access. The *Brief* provides examples of how an organization can implement these principles in the design of their physical space, service delivery system(s), and customer resource(s) to increase accessibility for individuals from diverse educational backgrounds; racial, linguistic and ethnic cultures; as well as for individuals with disabilities.

3. "Communication Hints" is an excerpt (see page 4) of the <u>University of Washington DO-IT Center</u> PDF publication, *Making Science Labs Accessible to Students with Disabilities* (2008). The DO-IT (Disabilities, Opportunities, Internetworking, and Technology) Center serves to increase the success of individuals with disabilities in challenging academic programs and careers. This site provides many examples of how to adapt activities and workspaces to promote the inclusion of people with disabilities.

<u>INTERMEDIATE</u>

☐ **Develop orientation checklist**   Return to A. 4. Indicators

1. The Elements of Orientation web link http://encorps.nationalserviceresources.org/mo_orientation.php provides information to assist in the development of orientation materials and sample checklists and forms.

2. *Inclusion of Persons With Disabilities in Service Days and Events*, a 71-page PDF from the Points of Light Foundation, provides a wealth of information including specific tips and pointers about orientation concerning partnering with individuals who have disabilities.

3. From the Nebraska Department of Health and Human Services, the Volunteer/Intern Orientation Checklist (PDF)

Appendix A. 5. - Resources

<u>NOVICE</u>

☐ **Create a performance appraisal form**   Return to A. 5. Indicators

1. This online resource, The ADA: Applying Performance and Conduct Standards to Employees with Disabilities http://www.eeoc.gov/facts/performance-conduct.html#basic provides guidance about the application of the American's with Disabilities Act and performance standards as relates to people with disabilities. Multiple case studies and *practical guidance* sections are included.

2. The CNCS Resource Center webpage, Evaluation of Members and Volunteers http://www.nationalserviceresources.org/volunteer-member-staff-management/evaluation includes a wide variety of sample forms and suggestions for performance management of volunteers. See sample volunteer evaluation form (Word) from the Regional Service Corps, Pasco, WA.

3. Monitoring and Evaluating Members http://encorps.nationalserviceresources.org/monitoring_and_evaluating_memb.php

4. Sample Member Evaluation of Placement Site (PDF) from Palouse-Clearwater Environmental Institute.

5. Sample Supervisor Evaluation of Member (Word) from Palouse-Clearwater Environmental Institute.

Appendix A. 6. – Resources

NOVICE

☐ **Knowledge of basic supervisory principles (e.g. Communication, setting clear expectations, listening skills, coaching skills, goal setting, providing feedback).** Return to A. 6. Indicators

  1. The CNCS Resource Center page on supervision http://www.nationalserviceresources.org/volunteer-member-staff-management/supervision includes a variety of resources on supervision. Included on the site are links to a supervisor resource manual, http://www.nationalserviceresources.org/becoming-supervisor and a supervisor toolkit http://encorps.nationalserviceresources.org/supervisors_toolkit.php

☐ **Identify and articulate performance expectations** Return to A. 6. Indicators

  1. *Supervising Service Members and Volunteers with Disabilities* (PPT) is a PowerPoint presentation from the Job Accommodation Network (JAN) that provides information about supervision and performance evaluation of volunteers with disabilities.

  2. This link provides information about the member/supervisor relationship http://encorps.nationalserviceresources.org/creating_effective_member_supe.php

INTERMEDIATE

☐ **Communicate regularly with volunteers** Return to A. 6. Indicators

  1. The United Way AmeriCorps Training and Technical Assistance publication (41-page PDF), *A Managers Guide to Communication*, includes steps to enhance and improve communication style.

☐ **Assess performance and personal skills and work products**

Return to A. 6. Indicators

  2. *The Interactive Process*, a fact sheet from the Job Accommodation Network (JAN), includes a step-by-step process for collaborative development of reasonable modifications to enable volunteers with disabilities to carry out position responsibilities.

☐ **Develop corrective action plan if necessary, based on progressive discipline procedure**

1. Applying Performance and Conduct Standards to Employees with Disabilities, http://www.eeoc.gov/facts/performance-conduct.html#basic

2. This Indiana University link provides a sample performance improvement plan with step-by-step instructions. http://www.indiana.edu/~uhrs/training/ca/performance.html

3. This archived (2000) but still useful online resource, *Retaining Members through Conflict Resolution*, is provided through the Corporation for National and Community Service: http://www.nationalserviceresources.org/conflict-resolution-members.

Appendix A. 7. - Resources

NOVICE

☐ **Know a range of methods, tools and tangible rewards for recognizing the work of volunteers.**

1. This website from Volunteer Canada provides an array of information about how to recognize and reward volunteers.
   http://volunteer.ca/topics-and-resources/recognition

2. This short article shares ideas and offers examples of how to both reward and challenge volunteers.
   http://www.charityvillage.com/cv/research/rvol38.html

3. The Energize website provides a list of ideas for volunteer recognition.
   http://www.energizeinc.com/ideas.html

4. This web link provides information from the Corporation for National and Community Service about recognition and retention of volunteers.
   http://www.nationalserviceresources.org/volunteer-member-staff-management/retention

ADVANCED

☐ **Adapt the work plan based on feedback from volunteer, the supervisor, and the agency.**

1. This National Service Inclusion Project Fact Sheet, *Five Practical Tips for Providing and Maintaining Effective Reasonable Accommodations*, offers guidance for providing and maintaining reasonable accommodations for service members and volunteers with disabilities. *Five Practical Tips* is available in PDF format in the Section B Appendices folder of the *Inclusion Competencies* CD.

Appendix B. 2. - Resources

INTERMEDIATE

☐ **Know essential cost elements of program operations** Return to B. 2. Indicators

1. Suggested language and rationale for including disability accommodations as a line in project budgets (see the 2-page PDF excerpt from the Budgets, Funding & Sustainability section, page 190-191 of the Community Technology Center's Start Up Manual (270-page PDF) http://www.vaservice.org/uploads/public/Resource_Library/Technology_Assistance/Community_Tech_Center_Manual.pdf.

2. Sample Reasonable Accommodation Request Form (Word) developed by the Job Accommodation Network (JAN).

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