

### Volunteer Engagement Assessment Tool

When considering efforts to engage more volunteers, it’s useful to review the elements of effective volunteer engagement. By considering where your United Way is relatively strong and where you are in need of further work, you can prepare your organization to maximize the positive impact of new volunteers, for United Way, for the community and for the volunteers themselves.

Below is a list of key elements for effective volunteer involvement — please rate your United Way on each of these elements using the scale provided.

**READINESS**

**Philosophy — we are clear on why we want to engage more volunteers.**

Very clear      To some extent      Not very clear      Not at all clear      Don’t know

**Strategy — we have clear goals we’ve set for volunteer engagement.**

Very clear      To some extent      Not very clear      Not at all clear      Don’t know

**Volunteer engagement is very important to our senior management and board of directors.**

Very important      Somewhat important      Not very important      Not at all important      Don’t know

**Our United Way climate and culture is welcoming to volunteers.**

Very welcoming      Somewhat welcoming      Not very welcoming      Not welcoming      Don’t know

**We have clear and comprehensive policies in place about volunteer engagement.**

Yes      To a large extent      To some extent      No      Don’t know

**We have policies and procedures in place for risk management pertaining to volunteer engagement**

Yes      To a large extent      To some extent      No      Don’t know

**We conduct criminal background checks on some or all of our volunteers**

- Yes
- No

Don't know

**Our staff who engage volunteers know how to design volunteer jobs and write volunteer position descriptions.**

Yes    To a large extent                      To some extent                      No    Don't know

## RECRUITMENT AND PLACEMENT

**Our staff who engage volunteers know how to target their recruitment efforts and craft messages for specific audiences.**

Yes    To a large extent                      To some extent                      No    Don't know

**Our staff knows how to get recruitment messages out to the audiences they're targeting.**

Yes    To a large extent                      To some extent                      No    Don't know

**We have a clear procedure in place for handling all inquiries from prospective volunteers.**

- Yes
- No
- Don't know

**Staff have appropriate training and/or experience in interviewing volunteers.**

- Yes
- No
- Don't know

**All new volunteers have been interviewed before being accepted to work with United Way.**

- Yes
- No
- Don't know

## ONBOARDING AND TRAINING

**We have an orientation or onboarding session prepared for new volunteers.**

- Yes

- No
- Don't know

**All new volunteers are onboarded /oriented prior to or shortly after they begin work with United Way.**

- Yes
- No
- Don't know

**We consistently provide training to volunteers to enable them to do their work effectively.**

Yes      To a large extent                      To some extent                      No      Don't know

## PERFORMANCE MANAGEMENT

**All staff who supervise volunteers have appropriate training and/or experience in effective supervision and delegation.**

Yes      To a large extent                      To some extent                      No      Don't know

**We have a procedure in place to ensure that staff regularly provide feedback on performance, including performance reviews, to volunteers.**

- Yes
- No
- Don't know

**We use a mutual performance review process with volunteers and their supervisors.**

- Yes
- No
- Don't know

**All staff who supervise volunteers have appropriate training and/or experience in giving constructive feedback on performance.**

Yes      To a large extent                      To some extent                      No      Don't know

## CONTINUOUS IMPROVEMENT

**Our staff working with volunteers understand how to capture and provide feedback to management on ways we can improve our volunteer engagement efforts.**

- Yes
- No
- Don't know

**We have methods for capturing and reporting on the impact of volunteer engagement on our Individual Engagement efforts.**

- Yes
- No
- Don't know

**We have methods for capturing and reporting on the impact of volunteer engagement on our Community Impact goals.**

- Yes
- No
- Don't know

**RELATIONSHIP MANAGEMENT AND INDIVIDUAL ENGAGEMENT**

**Our staff working with volunteers understand the importance of ongoing communication with volunteers to relationship management; they see this as part of our United Way's individual engagement strategy.**

- Yes    To a large extent                      To some extent                      No            Don't know

**Staff are skillful in using a variety of communications methods to ensure good communication with volunteers.**

- Yes    To a large extent                      To some extent                      No            Don't know

**Our staff working with volunteers understand the importance of expressing appreciation to volunteers to relationship management; they see this as part of our United Way's individual engagement strategy.**

- Yes    To a large extent                      To some extent                      No            Don't know

**Staff are skillful in using a variety of methods to ensure that volunteers receive recognition and feel appreciated.**

- Yes    To a large extent                      To some extent                      No            Don't know



Once you've completed this assessment, take some time to review your results, paying special attention to areas where you rated yourself lower and also those areas where you weren't sure of your overall performance or practices. These are areas that you will want to work on as you begin to prepare for and to engage more volunteers. This guide provides you with resources that speak to all of these competencies; using your assessment results will help you hone in on those areas where you want to focus your attention.