

UNITED WAY GUIDE TO
STRATEGIC
VOLUNTEER
ENGAGEMENT

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INTRODUCTION

To cut the number of high school dropouts in half by 2018, United Way will recruit one million volunteer readers, tutors and mentors over the next three years.

Volunteering is vital to a just society, fostering civic responsibility, participation and interaction. It strengthens communities by increasing their capacity to identify and respond to human needs. Volunteering creates ownership of the community, its assets and needs among the people who live and work there. Volunteering creates relationships at the institutional and personal level that are a vital part of the fabric of the community.

Today, volunteers are on the forefront of much of the resource mobilization, relationship building, impact agenda setting and other key United Way functions. They are the tutors, mentors, budget counselors, coaches, United Way campaign managers, community advocates and many others who give freely of their time and talent to impact education, income and health in our communities.

To attain the ambitious United Way community impact goals, we must engage an unprecedented number of volunteers. Volunteer engagement of this magnitude must be intentional and strategic and must be positioned by all United Ways as a highly visible business strategy and an essential part of our brand promise. A volunteer strategy will identify specific goals and activities and ensure the adequate resources to achieve the desired results. Beyond that, the volunteer strategy is the vehicle through which United Way relates directly to individuals and demonstrates commitment to those who want to make a difference. It reinforces the



United Way is my “go to” place to make a difference in the world.

It gives me the tools and opportunities to impact education, income and health in my community.

I am a volunteer reader in our elementary school; I participate in school board meetings to advocate for reforms that improve literacy education. I donate and recruit others to join so our children will be able to read by the 4th grade, graduate from high school and get jobs creating a better life for all.

– Highly Engaged Volunteer

relationships with the organizations we serve but it focuses primarily on individuals. Ultimately a successful volunteer strategy will create a lifelong volunteer and long term United Way supporter, who brings passion, expertise and resources in diverse ways to get things done. This individual will have chosen United Way as the way to make a lasting difference in our communities and will recognize and promote the role United Way has in improving education, income and health.

The United Way Volunteer and Employee Engagement Council – comprised of representatives from United Ways across the U.S. and United Way Worldwide staff – has sought to capture some of the experiences and best thinking on United Way volunteer engagement strategies at the local level. This guide describes what volunteer engagement means in the United Way network, offers suggestions for thinking through a strategic approach, and shares examples of best practices and strategic plans. While volunteer strategies will vary from community to community, together we will drive and accelerate community impact by building and strengthening relationships with essential community stakeholders.

UNITED WAY AND VOLUNTEER ENGAGEMENT

History and Evolution

For most of its history, United Way was viewed primarily as a funder. Volunteers were a means to an end – help raise the money and help give it away. A “United Way volunteer” was another name for a board or committee member or a campaign volunteer. They tended to be company executives, not the public at large. Other volunteer roles, if they existed at all, were considered less important and consequently, not well resourced, or properly managed or recognized.

When United Way did create volunteer activities – such as Day of Caring – they usually were episodic, short-term events designed to meet corporate donors and partner agency needs. United Ways were mostly intermediaries that connected volunteers to other organizations – a role that was enhanced by the advent of online volunteer matching. Volunteers identified with the agencies, not United Way. “Recruit, refer, or place” were the volunteering actions most familiar to United Ways and their supporters.

Over time, many nonprofit organizations around the world gained a new appreciation of the value of volunteers and their power to make a difference, including United Way. To meet the needs of volunteers and to better tap into their time and talent, “Volunteer Centers” were established – some in connection with United Way. Recently, there has been a renewed interest in the role of Volunteer Centers resulting in a need to strengthen engagement strategies across the country. Many United Ways across the country are creating, merging with or partnering with Volunteer Centers.

CORE FUNCTIONS OF A VOLUNTEER CENTER

- Mobilize volunteers to impact identified community issues
- Encourage volunteering
- Connect people to volunteer opportunities
- Provide training and support for effective volunteering

Volunteer engagement must be positioned by all United Ways as a highly visible business strategy and an essential part of our brand.

In May 2008, United Way Worldwide issued a call to action, to Live United, to give, advocate and volunteer to achieve goals in the U.S. in education, income and health by 2018:

- **Cut America’s High School Dropout Rate in Half**
- **Cut in Half the Number of Lower-Income Families Who Are Financially Unstable**
- **Increase by One-Third the Number of Youth and Adults Who Are Healthy and Avoid Risky Behaviors**

These unprecedented goals can only be reached through extraordinary volunteer engagement that will position United Way as the premier volunteer mobilizer in the areas of education, income and health. Now United Ways must develop strategies to deliver on this powerful brand promise. For instance, to cut the number of high school dropouts in half by 2018, United Way will recruit one million volunteer readers, tutors and mentors over the next three years. By closely aligning volunteer activities with the impact agenda and our brand, United Ways will leverage significant existing assets across the system, including online infrastructure, established programs such as Day of Action and Day of Caring, and the millions of people who volunteer with or through United Way each year. This guide provides ideas on how to create this alignment. It starts with United Way’s definition of strategic volunteer engagement.

DEFINITION OF STRATEGIC VOLUNTEER ENGAGEMENT

What does United Way mean by strategic volunteer engagement?

For United Way, volunteer engagement is involving people in strategic volunteer roles to advance the common good and build their relationship with United Way.

Let's look more closely at what this means:

Strategic volunteer engagement is involving people ... United Ways must help make it possible for individuals to act on issues they care about in ways that will make a difference. The “people” include:

- Employees
- Members of affinity groups
- Students
- Retirees
- Recipients of agency services
- Current United Way volunteers
- Anyone else seeking to make a difference

In strategic volunteer roles to advance the common good ... Volunteer roles are strategic if they are tied to United Way impact areas, education, income and health. Volunteer roles should be an integral part of United Ways’ plans, not an afterthought or “add-on” after plans are in place. Many United Ways may need to revisit their community impact strategies to make sure that volunteer engagement is properly integrated. The bottom line: strategic engagement of volunteers connects their interests with impact area activities that produce measureable results, and volunteers understand how their actions contribute to a larger effort. United Way volunteers see themselves as part of a bigger cause.



Volunteer roles are strategic if they are tied to United Way impact areas and build on United Way's current work.



And build their relationship with United Way ... A relationship with United Way means that an individual looks to United Way as a resource, not just as an intermediary. A person has an engaged relationship with United Way when he or she self-identifies as a United Way Volunteer, even if they are working with a United Way company or partner agency. “Relational” volunteering is when the volunteer action enhances deeper, more meaningful relationships and when United Way is seen as the primary volunteer partner or expert.

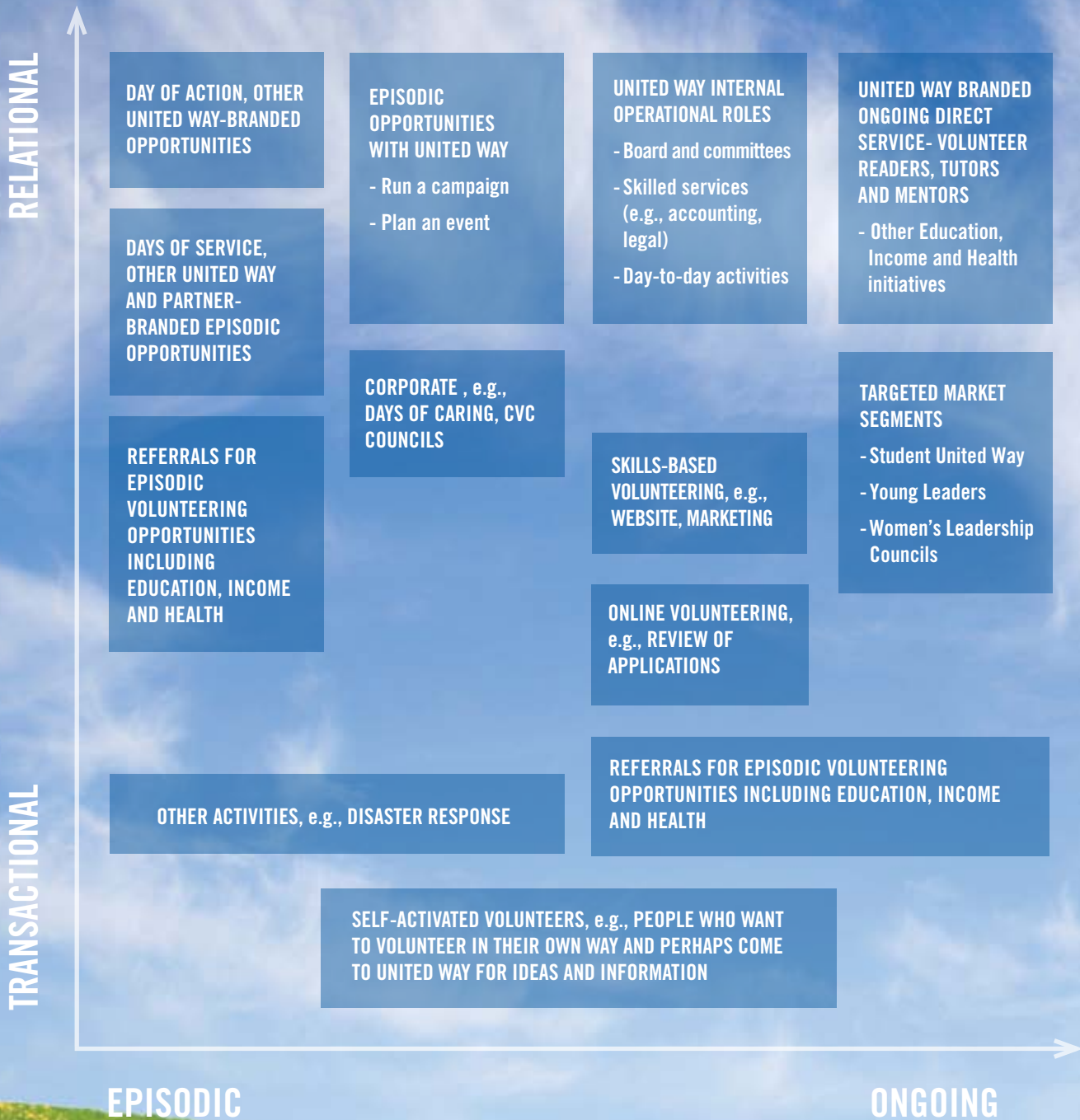
In contrast, “transactional” volunteering may not lead to a deep relationship with United Way. A transactional volunteer may see another entity as the primary partner, even if United Way has connected him or her to that volunteer role. With transactional volunteers, United Way is at risk of losing contact with the volunteer and his or her valuable contribution.

United Ways should offer a variety of volunteer roles to help constituents understand, experience, and feel connected to our work. To build greater loyalty and engagement, however, United Ways should emphasize relational volunteering whenever possible.

For example, a volunteer might be referred by United Way to participate in a community agency’s book drive. The volunteer collects books from friends and family and delivers them to a designated collection site. This form of episodic, transactional volunteering is valuable as a point of entry to deeper engagement. This same volunteer could become more engaged in education, however, when through the local United Way she learned about the connection between reading books at a young age and graduating from high school. She sees United Way as a leader in education, and decides to sign up to read to young children through a United Way partnership with the local library system. Over time, United Way lets her know about the town council meeting and she uses the talking points they provide to advocate for more funds for reading activities in libraries and other places where afterschool programs are offered. She reminds friends via Facebook and other means about the need for both books and financial donations to United Way. The volunteer later might be asked to serve on a United Way committee, further strengthening her ties to and support for the organization. The volunteer then becomes an advocate for United Way and recruits others to join from her personal network.

This example is but one of a myriad of ways that United Ways can engage volunteers strategically to advance the common good and strengthen their relationship with United Way. If this example is the vision we are aiming for on the horizon, it will be helpful to understand and assess the landscape of United Way Volunteer Engagement today.

UNITED WAY VOLUNTEER ENGAGEMENT LANDSCAPE



The word “landscape” implies particular features of a region or situation as a whole. The United Way Volunteer Engagement Landscape has diverse features that can be characterized by:

- **Frequency.**

Depending on the frequency, volunteering can be episodic or ongoing. Episodic volunteers may participate in a unique one time event such as a day of service designed to celebrate a company’s 50th anniversary or a service event that occurs annually such as the National Day of Action, which takes place every year on June 21. It can also be a longer limited engagement such as a campaign which may go on for a few months. Ongoing volunteering implies that the volunteering activities occur on a continuing basis without a predetermined ending date (e.g., a volunteer who reads to children in school for an hour every week).

- **Relationship.**

As already described, volunteering is relational when the volunteer has a strong relationship to United Way and considers himself a United Way volunteer. Relational volunteering is developed through United Way branded opportunities and by ongoing communications between United Way and the volunteer in between activities. Volunteers who engage directly with United Way on the board, committees, campaigns and day-to-day tasks are likely to be relational volunteers. When the volunteer does not have a strong relationship with United Way and sees United Way as an intermediary between himself and the agency where he volunteers, the volunteer activity is transactional.

- **Strategic Impact.**

Volunteering is considered strategic when tied to United Way community impact goals in education, income and health (e.g., volunteer readers, tutors and mentors).

These three characteristics will vary depending on the type of volunteer role.

The diagram to the left portrays the United Way Volunteer Engagement landscape. Your own United Way most likely will have some of these kinds of volunteering in your landscape. **All** types of volunteering are important because they respond to volunteers, their interests and their availability. They are also, if well managed, the many different entry points to a path of long lasting contributions that will lead to achieving United Way’s goals in education, income and health.

Volunteers who feel meaningfully engaged stay engaged longer, donate more and recruit other volunteers and donors

The following pages define the different points on the landscape of volunteer engagement and some of the strategies United Ways have used to deepen engagement, impact and the relationship with United Way.

United Way Internal/Operational Roles

Beyond the traditional board and committee roles, how else can United Way bring volunteers into their buildings to increase their operational capacity and ability to reach impact goals? Every United Way should recruit a core group of “United Way Volunteers” who perform skill-based and everyday tasks (event planning, marketing, web support, accounting, writing, judging, grant reviews, fund development, and whatever else is needed.) One of the first steps might be to recruit a skilled volunteer to facilitate the development of the volunteer engagement strategy. Regardless, managing volunteers in any capacity takes effort and will most likely succeed when clearly defined roles, expected outcomes and good supervision are in place. These are essential elements of a good, sustained volunteer experience that generates results.

Example: In Portsmouth, NH, United Way of the Greater Seacoast (UWGS) has engaged skilled volunteers on a committee called the Communications Collaborative. The Communications Collaborative (C2) Committee is an advisory group composed of marketing, public relations, and media professionals. The purpose of the C2 Committee is to provide strategic marketing and communication direction to assist UWGS in increasing awareness and favorability among targeted prospects. The C2 will help UWGS develop better year-round visibility and communication with donors, and focus limited resources for maximum return on investment of marketing dollars and staff time.

What about volunteer roles that are *not* directly tied to education, income and health?

Although United Way’s strategic volunteering is tied to its impact goals, in some cases there is need and value in promoting and supporting volunteer engagement more broadly. If a United Way serves as the Volunteer Center in the region, its role of connecting people to a variety of opportunities to serve and building the capacity of agencies to manage volunteers is very important. United Ways in similar positions might re-examine their work to identify ways they could be more closely aligned with impact goals. This might mean giving up some activities that have been priorities in the past to allow for the capacity to be more strategic. Be creative in finding resources and approaches that satisfy different needs but focus on results tied to the impact areas.



Example: One of United Way of King County's (UWKC) key strategies for volunteer engagement in the Seattle, WA area is to "Mobilize volunteers strategically for community impact and leadership."

UWKC's plan states:

"Focus on creating tangible impact in UWKC's engagement of volunteers and their resulting efforts. This strategy focuses on UWKC's mobilization of volunteers for its community impact work, whether it be for volunteers with UWKC or mobilizing volunteers on behalf of our community partners within our priorities. If UWKC wants to be acknowledged as the local leader for volunteerism, it needs to demonstrate that it recognizes the power of volunteers to change community conditions.

- Establish focused and intentional integration of volunteering within UWKC's volunteer committee structure (Community Building Committee, Impact Councils, etc.) and investment/community strategies to ensure UWKC conveys and aligns its commitment to volunteerism as a tool addressing community issues.
- Identify, create and promote volunteer opportunities and/or mobilization campaigns tied to UWKC investment priorities that demonstrate the power of people coming together to tackle tough community problems (e.g., campaign to eliminate waitlists for mentors, tutors.)"

United Way-Branded Ongoing Direct Service

United Way wants to position itself as a leader in volunteer engagement in education, income and health. This means meeting the needs of communities and volunteers through a variety of opportunities, particularly United Way-branded, strategic, ongoing opportunities. Volunteers who provide an ongoing service to the community that directly advances United Way's work in education, income and health will provide the biggest return on organizational investment. Focusing on this type of volunteer engagement will accelerate impact by providing much needed services on a consistent basis. In addition, people who volunteer on an ongoing basis are more likely to donate to causes they care about. Broad volunteer mobilization for this type of work can make United Way more attractive for grants and other funding. Creating ongoing, impactful United Way volunteer experiences – such as youth mentoring, reading to third graders, or serving as a Volunteer Income Tax Assistance (VITA) volunteer – can create informal brand ambassadors and advocates for United Way. Over time, these committed volunteers should be invited to take on additional roles and leadership positions.

Volunteer engagement is based on the premise that we all have some time and talent to give, and that bringing people together, rather than working in isolation, strengthens community and can achieve greater impact. This logic applies to partnerships with other volunteer or charitable organizations. To lead or facilitate ongoing, United Way-branded direct service, local United Ways do not have to "own" every volunteer opportunity in education, income and health in their towns, they can also partner with other organizations to help achieve their goals. A community might already have another entity successfully engaging volunteers that tie directly to one or more of the United Way's community impact goals. In that event, the United Way should not re-create the wheel, or duplicate services, but should look for ways to collaborate, support and extend the work. It should also look for ways to clearly demonstrate the value it brings and be recognized for the role it plays. Co-branding of initiatives might be an option.

Example: United Way of King County (UWKC) has brought this strategy to life by mobilizing volunteers for its Volunteer Reader Program at child care centers, Head Start and other preschool programs. The programs were not able to engage volunteers before because they lacked volunteer management capacity. UWKC created a staff position to provide centralized coordination for the work of the volunteers, including volunteer and site recruitment, background check and TB test paperwork, training, ongoing communication, volunteer management, and evaluation. The King County Library System provides regular volunteer training to teach the building blocks of literacy. The sites are learning more about the value of volunteers and how to work with them, and have found that the partnership with UWKC is a selling point with parents. Individual libraries in each classroom are sometimes supported by in-kind gifts or corporate sponsors.

Example: United Way of Metropolitan Nashville (UWMN) holds a Day of Action each quarter. UWMN holds four Day of Action events per year, each focused on a different impact area. For example, to showcase United Way’s health goals, the city-wide Day of Action focused on giving newborns a stronger start. The “Community Baby Shower” provided Nashville’s at-risk mothers with the essential baby items needed to ensure a healthy beginning for their newborns. For this and each Day of Action, UWMN targets employees as volunteers and provides participating companies with internal communications tools and themed boxes or bags to help collect donated items on site. Volunteers are recruited to assemble and help deliver items as well. UWMN also makes the Day of Action open to community volunteers, recruiting them through word of mouth, its website, contact lists, and social media outlets.

Day of Action, Day of Caring and Other Episodic Service Projects

With individuals and groups, United Ways offer episodic opportunities, such as Day of Action, as well as other United Way-branded opportunities tied to education, income and health. Day of Caring was created primarily for corporate volunteers, to reinforce the relationship between the company, its employees, United Way and the agencies. United Ways can learn from those experiences to create new roles for volunteers and draw from the broader community. Day of Action and other “done in a day,” volunteer events are a “point of sale” for United Way. These activities should meet a real community need, lift up our brand and be tied to impact strategies.



Example: United Way of Central Iowa (UWCI) recruits volunteers to accompany high school personnel in visiting homes of students at risk of dropping out of school. UWCI partners with Des Moines Public Schools for an annual “Reach Out to Dropouts” campaign to help keep more high school students on track to graduate. Volunteers attend a mandatory training, held on the Day of Action, and visit homes that have been identified as having students with a poor attendance record, to offer tips and resources for helping the student stay in school. UWCI has engaged a corporate sponsor in the effort, and is working to establish a mentoring role for volunteers who want to stay engaged year-round.

Targeted Market Segments

United Ways should develop strategic volunteer engagement around targeted market segments, such as Student United Way, Women's Leadership Councils, Young Leaders Societies and other affinity groups and key corporate customers.

Example: United Way of Massachusetts Bay and Merrimack Valley's (UWMBMV) Women's Leadership Council leads volunteer initiatives that are open to all volunteers, not just the affinity group's members. The UWMBMV's Women's Leadership Council has developed an agenda that includes fundraising, sponsorship of educational events tied to impact areas and year-round volunteer opportunities. For example, one educational event focused on the importance of reading to children at a young age to aid in the development of cognitive skills. The event also coincided with the launch of the summer book drive and the early readers program. Participants were encouraged to donate a book and sign-up to volunteer for the early readers program.

Example: United Way for Southeastern Michigan (UWSEM) engages college students (and companies) through national days of service. UWSEM's has two primary volunteer engagement channels: colleges and companies. UWSEM leverages Martin Luther King Day of Service, Make a Difference Day, and the 9/11 Day of Service and Remembrance to recruit and train college volunteers to serve at one of 25+ projects in the Detroit area. Students from as many as seven colleges are placed at sites in large teams, and work alongside corporate employee teams. UWSEM begins each day with tours to introduce volunteers to the work of United Way. Although each national day has its own branding, the United Way mission and branding is integrated throughout every activity and pre- and post-event communications. Back on campus, Student United Ways leverage renewed interest in volunteering following a national day of service by inviting the student volunteers to participate in ongoing projects.



Example: United Way of Northeast Florida (UWNF) affinity groups for women and emerging leaders focus volunteer engagement activities in the area of education. Both groups prioritize volunteer engagement over networking and other social activities for members. The women's leadership group coordinates monthly activities at Success By 6 centers and participates in Born Learning workshops throughout the year. The emerging leaders group focuses its service work on impacting drop-out prevention through a program that targets at-risk sixth grade students.



Skills-Based Volunteering

As noted earlier, volunteers can provide expertise to the United Way helping the organization run more effectively or to United Way partner organizations. Programs such as Volunteer Income Tax Assistance (VITA) enable volunteers to deliver direct, skilled service to partner agencies and their beneficiaries, enhancing the organization’s performance and capacity to deliver services, as well as improving efficiency.

Like all forms of volunteer engagement, however, placing skilled volunteers within United Way or on behalf of United Way in the community, will require United Way resources: making the right match, maintaining the United Way connection (over an allegiance to the agency alone), and troubleshooting issues between volunteers and agencies.

Example: In Portsmouth, NH, United Way of the Greater Seacoast (UWGS) engaged a volunteer to help manage their “SkillsMatch” program. UWGS uses Volunteer Solutions (an on-line resource that matches volunteers to opportunities) to provide agencies with a special place to post skills-based volunteer projects and as well as an online toolkit of resources that is accessible to both the agency and the potential volunteer.

If a volunteer with professional expertise does not see a match, the SkillsMatch Manager (be it a United Way staff person or volunteer) interviews the volunteer and creates an RFP (Request for Projects). Agencies are then invited to submit potential projects for that volunteer.

This is certainly an opportunity to invite agencies working in Community Impact areas to submit their needs. The SkillsMatch Manager works with the volunteer to choose a project and if necessary, meets with both parties to outline the scope of services document. Projects that were not chosen can remain on the website to be viewed by future volunteers.

The SkillsMatch Manager checks in mid-way, and again at the end of the project to request feedback from the volunteer and the agency. The United Way can maintain communications with the volunteer in a variety of ways. The relationship of the SkillsMatch Manager with the volunteer increases retention and helps develop loyalty to United Way.

Example: United Way of Massachusetts Bay and Merrimack Valley (UWMBMV) has a dual approach to corporate outreach.

The senior director of community impact and the development resource manager meet with company contacts to develop a joint giving and volunteer strategy for the companies' employees. Companies receive a volunteer "menu" that lists all opportunities and is coded by impact area, whether it is short or long-term, and whether it is skills-based or not.

For Brown Brothers Harriman, a financial services firm, UWMBMV and the company set goals for volunteers in tax preparation, Thanksgiving contributions and handing out meals, youth mentoring and financial education. The volunteer opportunities and relationship have been so successful in Boston that the company has extended its volunteer engagement and collaboration with United Way to its New York office and United Way of New York City.

Corporate Volunteer Engagement

It's important to develop ongoing, year-round relationships with employees, not just during the annual campaign or through a Day of Caring. Consider consulting with companies regarding the creation of or improvement of their employee volunteer program. Promote this as a resource for companies. Consider how your United Way responds to corporate requests for volunteer projects for its employees. Can you create United Way-branded roles? Share your strategies and point to what your United Way is doing in education, income and health and invite companies to build on that with you. One way to do this might be to establish a Corporate Volunteer Council (CVC). CVCs are comprised of representatives of companies that are engaged in corporate volunteer efforts (or want to be). United Ways can convene regular meetings of the CVC to share ideas and best practices and help facilitate cross-company and community volunteer engagement opportunities.

Example: Volunteer engagement was the point of entry to Panera Bread Company for United Way for Southeastern Michigan (UWSEM).

Knowing of a successful partnership with United Way of Greater St. Louis, Panera's corporate office in Detroit approached UWSEM to explore working together on volunteer initiatives. The first year of the partnership, UWSEM organized four volunteer projects, and has increased the number of volunteers and events it manages for Panera in each subsequent year. Furthermore, in 2008, Panera started including UWSEM in its in-store fundraising, and in 2010, UWSEM was the sole recipient of the funds. In 2011, the in-store fundraising will be tied to early childhood learning, a UWSEM priority area. UWSEM does not run an annual campaign with Panera. The strength of the relationship is based on mutually agreed upon goals and open communication regarding what works and what doesn't for each partner.

Example: United Way of Northeast Florida (UWNF) connects corporate volunteering to education, income or health. UWNF develops many activities for its corporate partners. At the beginning of these activities, a United Way staff person gives a brief informal presentation about United Way and how the employees' volunteer service connects to United Way's work. UWNF captures contact information and includes additional community impact information when it follows up with each volunteer. Many of UWNF's top 25 companies, such as Blue Cross and Blue Shield of Florida, participate in quarterly activities and volunteer throughout the year.



Example: United Way Worldwide (UWW) engages online volunteers to extend the impact of United Way National Day of Action and Student United Way. UWW advertised the need for a volunteer on Volunteer Solutions. Today this Delaware-based volunteer helps run the Student United Way competition by reviewing and organizing applications. Another volunteer, who lives in the Washington DC area, collects stories, photos and other details about National Day of Action plans in cities throughout the country. This information augments what it receives from local United Ways and helps UWW demonstrate the significance of the Day of Action to national partners, the media, and others.

Online or Virtual Volunteering

Online volunteering enlarges the volunteer pool and provides volunteering opportunities for people with limited time but a great desire to volunteer through convenient means by leveraging technology.

To help online volunteers perform at their best, communicate clearly and effectively with them, by sending messages that are concise and to the point. Provide volunteers with an overview of United Way and its impact goals as well as the project they will be undertaking and the tasks they will perform. Explain how the tasks should be performed and the expected results. Set clear goals and deadlines. Develop a relationship with your online volunteers by contacting them periodically, giving them feedback on their performance, providing information about the issue they are addressing and offering other volunteer resources. Online volunteers can do a variety of work from website development, database design, adding posts to Facebook and blogging to research, writing, training and coaching.



Volunteer Referrals

Many United Ways have long provided volunteer referrals, matching interested volunteers with agency opportunities. If United Ways are currently doing this work, they can continue, but should find ways to emphasize our leadership and commitment to impact in education, income and health. See the Appendix for Types of Strategic Volunteer Engagement and additional ideas regarding volunteer referrals.

Example: United Way of Yellowstone County (UWYC) in Billings, MT uses Volunteer Solutions to match volunteers with organizations in need of volunteers. One of the Volunteer Center activities at UWYC is to provide referral services for individuals and groups interested in being connected to volunteer opportunities. UWYC uses an online database, Volunteer Solutions, to help make many of these connections **and** their nonprofit and governmental partner organizations post volunteer needs which are promoted to the community. UWYC assists groups (businesses, schools, church groups, etc.) to locate volunteer opportunities by sending out a request for projects to their referral partners and then providing the project information to the group. UWYC has also developed a relationship with the local newspaper and features opportunities to volunteer in a weekly column.



As these examples show, the United Way Volunteer Engagement Landscape is diverse. United Ways should ask:

**What does the landscape look like for our United Way?
How do we change it to ensure that our volunteer engagement is more strategic?**

Strategic engagement doesn't just happen. Effective and sustained strategic volunteer engagement requires a thoughtful, specific strategy. So, how do we create it?

STRATEGIC VOLUNTEER ENGAGEMENT PLANS SHOULD:

- Align with organizational priorities and investments
- Include a wide range of complementary volunteer roles that achieve results in the impact areas
- Feature a robust menu of options appropriate for individuals and groups that will strengthen the volunteers' relationship with United Way
- Engage volunteers in all aspects of United Way



CREATING A VOLUNTEER ENGAGEMENT STRATEGY

For local United Ways, creating a volunteer initiative means investing time and effort to devise feasible strategies that are tied to community impact goals. It also means getting the buy-in of stakeholders that will help you successfully implement the strategy. We suggest you bring together a cross-functional staff team and get the input of all relevant stakeholders including volunteers. It may also be wise to have an external strategic planning facilitator to help manage this process. See the Appendix for additional resources including “Questions for Developing a Volunteer Engagement Strategy,” “Steps to Develop a Successful Volunteer Engagement Strategy,” “Strategic Volunteer Engagement Plan Template,” “Types of Strategic Volunteer Engagement” and a “Volunteer Engagement Checklist.”



Some United Ways have already started the strategic volunteer engagement planning process.

STRATEGIC VOLUNTEER ENGAGEMENT PLANNING TIPS

- ✓ Start with what you know. United Ways know the needs of the community.
- ✓ Don't go it alone. Pull together a cross-functional team from your United Way to plan. Engage partners and experts as well.
- ✓ Start with the overall community impact goals and strategies. Ensure that volunteering is an essential component to achieving these goals.
- ✓ If no one is doing it, seize it. Don't reinvent or duplicate. Create your own space.

Example: United Way of Massachusetts Bay and Merrimack Valley identified the following requirements for successful volunteer engagement:

Organizational Commitment

- Volunteer Engagement becomes a core strategy for all divisions and is delivered by all divisions
- Cross organizational team is created to staff and demonstrate organizational commitment

Adequate Staffing

- Cross organizational team for planning and strategy
- Include 1 staff member from each division and 2 from the Lowell office
- Include in performance objectives
- Team reports to one SVP who provides direction and oversight
- Adequate administrative resources within each division to ensure quality execution

Technology Infrastructure

- Development and refinement of effective and reliable Relationship Management Tool (Business Integration & Marketing)
- Inclusion of volunteer engagement strategies and activities in design and specifications of Relationship Management Tool

Example: United Way of Central Iowa (UWCI) created an inventory of its work to promote volunteering and to engage volunteers. The inventory included all activities and demonstrated which were aligned to the impact strategies, which connected United Way to its key stakeholders and which activities could easily be undertaken by other organizations. For example, an association of volunteer managers, whose focus went beyond United Way’s impact areas, transitioned from being run by UWCI to being self-governed, with support from UWCI. The inventory took only a few months and the re-alignment was completed within a year. With the strategic shifts within United Way at the national level in 2008, UWCI began the process of setting goals in volunteer engagement that are tied to its strategic plan for achieving its goals in education, income and health.

UWCI has two primary volunteer engagement goals:

Primary Goal #1: To strategically support UWCI’s Goals for 2020 in the areas of Education, Income and Health by providing real strategies and opportunities for people to create sustainable change through volunteering their time, talent, voice and expertise.

Strategy 1: Position United Way as the “go to” place for volunteering with an agenda focused on Education, Income, Health, and Crisis Readiness and Response.

1. Recruit a Board Level Champion to lead the United Way VOLUNTEER agenda.

Resources: Executive

Timeline: 3rd Quarter FY11

2. Develop a comprehensive plan to redesign the website volunteer pages, opportunities database and Internet presence that will market United Way as the primary source for volunteer opportunities in central Iowa. Significantly expand and brand our online volunteer opportunities database so it reflects the volunteer priorities in education, income, health and crisis readiness and response.

Resources: Intern/web design

Timeline: 4th Quarter FY11

Measure: Unique visitor reports and opportunity reports

Primary Goal #2: To build and deepen relationships with people who care about their communities by inspiring and inviting them to take an active role in helping United Way achieve goals in education, income and health.

These examples are intended to help spark ideas about how your United Way might go about planning for strategic volunteer engagement that is essential to achieving your goals and to ensuring those achievements are sustainable. Regardless of which area your United Way focuses on, an overarching volunteer management system will be essential for sustained success.

VOLUNTEER MANAGEMENT

Reinforcing the United Way brand at every opportunity and ensuring a positive volunteer experience are key considerations in executing a volunteer engagement strategy. Managing volunteers requires dedicated resources. To build the kinds of relationships with volunteers that will lead to community impact and support for United Way, dedicated staff must be responsible for managing the recruitment and communication with volunteers year round.

There is a wealth of information available on the effective management of volunteers, and United Ways should learn and practice the techniques that would be appropriate depending on the kind of volunteer engagement. Two of the most essential practices are recognizing and tracking volunteers.

United Ways must recognize volunteers regularly. The recognition should not be limited to fundraising or board service. Whether volunteers are helping upgrade your IT system, recruiting 100 additional volunteers for Day of Action or reading with children, United Ways must establish ways to recognize their volunteers. This could mean an ad in the local paper, an annual awards ceremony or more.

United Ways also should establish effective tracking procedures, with volunteer data captured in a **central** database. Volunteer engagement information should be integrated with “give” and “advocate” data, to better understand each individual’s involvement with United Way and to analyze how each action impacts the other. At a minimum, data collected would include tracking volunteer names, email address, type of engagements, areas of interest and any training provided. This data should be leveraged to deepen relationships with individuals, and demonstrate the value of investing in volunteer efforts. At a minimum, there should be communications to thank them for their efforts, to inform them about the work of United Way and to ask them to engage in opportunities to give, advocate and volunteer some more.

Example: The LIVE UNITED Recognition is United Way of Central Iowa’s (UWCI) tribute to philanthropic efforts and measureable community impact. UWCI accepts nominations for individuals, businesses, and other organizations to be recognized for their efforts to give, advocate, or volunteer in education, income or health. Volunteer judges representing a cross-section of community donors, advocates, and volunteers (but not United Way staff) review the applications and choose the awardees in the various categories.

Example: United Way for Southeastern Michigan’s (UWSEM) volunteer services department leveraged its relationship management tool to demonstrate how volunteers can become donors to United Way. Like many United Ways, UWSEM had a Relationship Management tool that was used primarily by fund development staff. The leadership team set goals for each department to increase its use of the tool. The volunteer services department started tracking company inquires for volunteer projects as well inputting more than 2,000 new names and contact information of corporate volunteers gleaned from release forms that each volunteer must complete. This information had not been available previously, and has led to the donor services, volunteer services and marketing departments sharing responsibility for communicating and building relationships with prospective and current volunteers and donors. The volunteer services team is now able to generate reports demonstrating how some volunteers have become donors.



CONCLUSION

Well developed and implemented volunteer engagement efforts – upheld through good volunteer management – will drive community impact strategies and build and strengthen relationships with essential community stakeholders. Creating a strategy and engaging volunteers more deeply and in a variety of ways will require an investment of time and money, but the effort will pay off. It will accelerate results in the areas of education, income and health and may also lead to greater financial support, both from individuals and grant-making organizations.

Every United Way will build its volunteer engagement capacity at a different pace. For some, planning a Day of Action on June 21 will be the start. Others may decide to offer quarterly opportunities in one impact area, or might recruit for a year-round volunteer program. Creating roles for volunteers at United Way for day-to-day operations might be a starting point for others.

Regardless of what each United Way’s “volunteer engagement landscape” looks like, United Ways that demonstrate excellence in strategic volunteer engagement will:

- Make volunteer engagement a core strategic function, a key driver for achieving impact goals and an essential part of the brand experience
- Create, promote, and manage (or co-manage) volunteer roles tied to education, income and health
- Offer a range of volunteer roles, from episodic to ongoing to skills-based, and strive to engage volunteers over time in more than one type of volunteer role
- Aspire to be the knowledge leader and go-to source for volunteering as well as understand *how* volunteer activities are helping to achieve goals
- Build and deepen relationships with individuals over time
- Emphasize the essentials of volunteer management to assure an ideal volunteer experience that produces results
- Builds in opportunities to assess progress and make adjustments
- Invest upfront and provide ongoing resources to support volunteer engagement to advance the common good

Moving toward this model will require considerable effort but nowhere does it state that United Ways must go it alone, or must “do it all.”

Volunteering is a strategic tool that when used wisely provides an enormous advantage to our communities. United Ways must strengthen community trust and build a strong reputation as an authority on volunteer engagement. We must deliver on our brand promise by building awareness and opportunity for people to engage and become invested in and responsible for long-lasting impact.

The most important thing is not *what kind* of volunteer roles you create and offer, but connecting your approach to your United Way priorities and to building relationships with people from all parts of the community who are critical to the success and sustainability of our work.



QUESTIONS FOR DEVELOPING A VOLUNTEER ENGAGEMENT STRATEGY

Consider the following questions as you plan and write your United Way's volunteer engagement strategy. These questions are intended to help you think comprehensively and strategically.

Create impact in education, income and health

- What are our impact goals?
- What work do we already have underway in the impact areas?
- Will new or increased volunteer engagement in those areas have a lasting impact? If so, how? If not, where can volunteers make the greatest impact?
- Is there an issue that we are ready to take to the next level of community support to expand impact?
- Who else is leading efforts in education, income and health? What is the volunteer component of their work? How can we avoid duplication, and instead find our unique role? What holes exist that United Way could fill?
- How do we connect volunteering with opportunities to give and advocate?
- How can we ensure that our strategy reflects the diversity of our community and is inclusive?

Next, ask what needs to happen to actually get volunteers engaged and to generate impact.

Volunteer Engagement

- What kind of and how many volunteers do we need?
- Who are the stakeholders for these issues – companies, government and community agencies? How will we get their buy-in?
- What other partnerships can we create to increase volunteer recruitment and impact?
- What are the best practices for volunteer management?
- What staff members need to be involved, hired, and trained to create partnerships and manage volunteers?
- Who will be responsible for ongoing relationship management and communication with the volunteers?
- How will we incorporate volunteer data into the relationship management system?
- How will we know if our volunteer engagement strategy is successful?
- What do we need to put in place now so that we can measure impact?
- How will we position and communicate our expanding role to the community?



And, the ultimate question – what resources do we need to create impact?

Resource Planning

- What resources will we need?
- Where will we get them?
- How can we minimize costs?
- Should we consider sponsors?

STEPS TO DEVELOP A SUCCESSFUL VOLUNTEER ENGAGEMENT STRATEGY

1. **Recruit a cross-functional team.** Involve the people whose buy-in is critical to the design as well as the implementation of the strategy. Ideally the volunteer manager will be designated and will participate in the planning. In addition to staff from different areas, consider including a couple of partners (businesses and agencies), board members and other volunteers. You may also benefit from the presence of an outside expert on volunteering or a manager of a successful volunteer program.
2. **Recruit or hire a facilitator.** Having a facilitator allows the staff to focus on the content of the discussion rather than on the process. A good facilitator keeps the discussion focused on what needs to be accomplished and at the same time makes sure everybody's input is heard.
3. **Prepare for the strategy meetings.** It may take a full day or several meetings to discuss and agree on a written strategy. Work with the facilitator to establish the goals and the process for the meetings. Also decide what materials you will provide in advance to help inform the discussion. Suggested materials include: this guide, your strategic plan and information about volunteer management.
4. **Make an organizational commitment to volunteer engagement.** Start with United Way's ambitious impact goals. Recognize the critical role of volunteers in achieving these goals. Make a new or renewed organizational commitment to volunteer engagement and allocate adequate staff and resources to it.
5. **Streamline the work.** The volunteer engagement strategy may increase the work load of United Way. This is a good time to review all of your United Way's activities to ensure that your impact areas have the necessary staffing and other resources.
6. **Start where you are and build upon it.** Review your strategic plan and identify the areas where volunteers can help achieve existing goals. Establish objectives for these areas and activities to achieve those objectives. Also identify who is responsible for these activities, when they should be done and what are required resources. (See Strategic Volunteer Engagement Plan Template)

7. Create the volunteer strategies. Consider the following:

- Overall goals (numbers, types of volunteers, types of opportunities, partners involved)
- Volunteer recruitment
 - Market segmentation (youth, older adults, skilled professionals, etc.)
 - Messaging around United Way and volunteers
 - Partnership development for recruitment (companies, places of worship, schools, etc.)
- Placement
 - Partnership development with schools, libraries, places of worship, recreation centers, after school programs, etc.
 - Volunteer opportunity development ensuring a variety of opportunities that meet diverse volunteer needs
- Volunteer management needs
 - Orientation and training
 - Recognition
 - Ongoing management
- Communications with volunteers partners and the broader community
- Volunteer tracking and reporting



STRATEGIC VOLUNTEER ENGAGEMENT PLAN TEMPLATE

This form can be replicated to accommodate as many goals, strategies and objectives as you may need.

Community Impact Goal: Improve 4th grade reading levels by 10 percent at three low income elementary schools by 2015.				
GOAL 1: Recruit XXX volunteers as readers, tutors and mentors				
STRATEGY 1: Create a Day of Action around early literacy goals				
OBJECTIVE 1: Recruit XXX number of people to participate in Day of Action.				
ACTIVITIES TO ACHIEVE OBJECTIVE	BY WHAT DATE?	WHO WILL DO IT?	WHAT RESOURCES ARE NEEDED?	DONE?
Activity 1: Create planning committee				
Activity 2: Define event theme and activities				
Activity 3: Market event				
Activity 4: Secure sponsorships and in-kind donations				
OBJECTIVE 2: Get at least XX% of the participants to volunteer to improve early literacy.				
ACTIVITIES TO ACHIEVE OBJECTIVE	BY WHAT DATE?	WHO WILL DO IT?	WHAT RESOURCES ARE NEEDED?	DONE?
Activity 1: Obtain participant Information				
Activity 2: Maintain contact and send periodic information about volunteer opportunities theme and activities				
Activity 3: Create a mechanism for participants to pledge to volunteer in the coming year				
Activity 4: Every six months, ask the volunteers to report on what they have done				

STRATEGY 2: Create United Way’s Afterschool Readers, Tutors and Mentors Program.

OBJECTIVE 1: Recruit XX individuals to be volunteer readers, tutors and mentors in libraries, schools, recreation centers and places of worship.

ACTIVITIES TO ACHIEVE OBJECTIVE	BY WHAT DATE?	WHO WILL DO IT?	WHAT RESOURCES ARE NEEDED?	DONE?
Activity 1: Create a marketing strategy				
Activity 2: Get commitment from partners, companies and agencies				
Activity 3: Identify existing and create new volunteer opportunities				
Activity 4: Recruit, screen, train, place and manage volunteers.				

TYPES OF STRATEGIC VOLUNTEER ENGAGEMENT

This table shows types of volunteer engagement and suggests ways to deepen this engagement and drive your efforts toward impact.

My United Way ...	Type of volunteering	Then you should ...
Engages with volunteers at the board committee and fundraising level, but not much else	Internal/ Operational	Work with board and stakeholders to develop a volunteer strategy tied to community impact goals
Is open to engaging skilled and day-to-day volunteers to help the organization run more effectively	Internal/ Operational	Create volunteer position descriptions and identify the goal the service will help your United Way achieve. Make it clear who the volunteer will report to and how their work will be evaluated
Recruits volunteers to serve on an on-going basis for a program United Way manages or co-manages	UW-Branded Ongoing Direct Service	Ask if the programs are tied to impact areas. If not, what are the lessons learned from this experience and how they can be applied to programs aligned with education, income or health? Create ongoing activities focused on education, income and health
Helps place or train skilled volunteers in direct service	Skills Based Volunteering	Capture volunteer contact information send newsletter lists; invite to other United Way service opportunities; communicate success stories
Develop and implement Day of Action and other service days for community-wide participation	Day of Action, other United Way- branded opportunities	Capture contact information of participants, add to newsletter lists; invite to other United Way service opportunities; communicate success stories
Has one or more affinity groups that are either self directed or work closely with United Way	Targeted Market Segments	Structure affinity group volunteer engagement to education, income and health

My United Way ...	Type of volunteering	Then you should ...
Organizes Day of Caring for corporate partners or has a long-term corporate partner that wants us to develop an employee volunteer program	Corporate	Work to structure your corporate volunteer engagement to education, income or health. Establish a Corporate Volunteer Council. Capture contact information of participants and develop a relationship with them.
Has an in house Volunteer Center function addressing widespread issues	Volunteer matching/ referrals	Continue to offer a wide range of volunteer roles but focus on education, income and health. Inventory existing activities and align them with organizational impact issues.
Has an independent Volunteer Center in the community	Volunteer matching/ referrals	Consider building the capacity of agencies whose missions are aligned with education, income and health, to accept and manage more volunteers by providing volunteer management training or partnering with an entity that does this. If you do not have a staff member with training expertise in this area, become the facilitator by bringing in an outside trainer.
Provide online volunteering opportunities	Online volunteering	Capture volunteer contact information and email addresses to deepen relationships with them by informing them and offering them specific opportunities in which to engage in other ways with United Way.
Provides online ideas for individuals who want to “self activate” i.e., volunteer independently	Self –activated volunteers	Find ways to capture individuals emails and develop a relationship with them by providing information and asking for feedback periodically. You may also create a group of “entrepreneurial” volunteers.

STRATEGIC VOLUNTEER ENGAGEMENT CHECKLIST

- ✓ Overarching plan for creating community impact in education, income and health which includes volunteer engagement components
- ✓ Dedicated budget for volunteer engagement
- ✓ Commitment to ongoing communication and relationship with volunteers
- ✓ Policies, procedures and knowledgeable staff to manage volunteer engagement: recruitment, training, retention, recognition, special events
- ✓ Variety of volunteer roles internal and external to United Way, from episodic to ongoing, from skills-based to everyday activities
- ✓ Ensure that volunteers receive a consistent brand experience that is meaningful and valuable to the volunteer and to the community
- ✓ Culture that fosters a mindset of United Way as an intentional mobilizer of volunteers
- ✓ Strong corporate relationships positioning United Way as the go-to source for meaningful volunteer roles
- ✓ Central repository for data collected as a result of volunteer recruitment and engagement
- ✓ Commitment to analyze results and improve performance
- ✓ Measure impact
- ✓ Communicate results



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ADDITIONAL RESOURCES

A variety of additional resources relating to volunteer engagement are available at www.online.unitedway.org/volunteer

For a quick and easy connection to colleagues who are also working on volunteer engagement strategies, join the **United Way Volunteer Engagement Listserv**. Simply send an e-mail message to subscribe addressed to listserv@listserv.unitedway.org. The subject of the message does not matter, but the body of the message must contain a command in the form: SUB UWVolunteerEngagement-L FirstName LastName

After sending this message, you will receive an automated message that gives further instructions on how to confirm your subscription and make it active.

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