VOLUNTEER MANAGEMENT COMPETENCIES

INDICATORS FOR NOVICE TO EXPERT

MANAGING SELF: TRAITS AND CORE COMPETENCIES

MANAGING PEOPLE: SUPERVISION & HUMAN RESOURCES

MANAGING PROJECT & PROGRAMS: MANAGEMENT & OPERATIONS

LEADING ORGANIZATIONS: LEADERSHIP

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Volunteer Management Competencies: Indicators for Novice to Expert

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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

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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 (activities) ☐ 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

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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

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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

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A. SUPERVISION AND HUMAN RESOURCES

Topic Skill Level	A. 5. Develop performance measurement system 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

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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)

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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, 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.

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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

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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

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B/ MANAGEMENT AND OPERATIONS

Topic Skill Level	B. 3. Manage technology 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

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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

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B. MANAGEMENT AND OPERATIONS

Topic **Skill Level**	**B. 5. Develop & maintain record keeping & documentation system** **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

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B. MANAGEMENT AND OPERATIONS

Topic **Skill Level**	**B. 6. Manage quality** **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

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B. MANAGEMENT AND OPERATIONS

Topic **Skill Level**	**B. 7. Develop and revise policies, processes, and procedures** **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.

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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

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C. LEADERSHIP

Topic Skill Level	C. 2. Partner, collaborate, work with others & facilitate work groups 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

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C. LEADERSHIP

Topic Skill Level	C. 3. Empower others 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

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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.

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C. LEADERSHIP

Topic Skill Level	C. 5. Learn, apply, and model the professional principles of volunteer management 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

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