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# Appendix to Boomer Volunteer Engagement Collaborate Today, Thrive Tomorrow

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Printable versions of the exercises from *Boomer Volunteer Engagement*.

Downloadable and fully interactive PDFs also available at [www.BoomerVolunteerEngagement.org](http://www.BoomerVolunteerEngagement.org).

The book is the guide for filling out the exercises with descriptions, examples, and suggestions.

## CHAPTER 2

Boomer Volunteer Engagement Task Force Brainstorm Exercise	2
Assessment of Organizational Volunteer Engagement	4
Needs Assessment	6

## CHAPTER 3

Work Plan	11
Progress Report	12

## CHAPTER 4

Opportunities for Boomer Volunteer Engagement	13
Volunteer Roles	14
Volunteer Position Description	17

## CHAPTER 5

Case Statement for Boomer Volunteer Engagement	19
Messages for Position Descriptions	21

## CHAPTER 6

Motivational Analysis	22
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## CHAPTER 7

Interview Questions	24
---------------------	----

## CHAPTER 8

Acknowledgment Tailored to Motivation	25
Individual Volunteer Plan	26



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## Boomer Volunteer Engagement Task Force Brainstorm Exercise

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1. Make a list of people already in your circle of influence from your board, current volunteers, donors, clients and their families, partners, and vendors to invite into the planning and implementation process.

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2. Of those individuals, whom would you describe as “visionary”? (Who has indicated an appreciation and understanding of the potential of Boomer volunteer engagement?)

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3. Of those individuals, who are the strongest Connectors? (Who knows a lot of people? Is skilled at bringing people together? Has an extensive list of contacts and uses it?)

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4. Of the individuals, who are the clear Mavens? (Which individuals have information about a topic of importance to this Task Force? Who collects information and likes to share it?)

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5. Who from your list are the Salespeople? (Who is charismatic? Who is a persuader?)

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6. What are the specific skills necessary for an effective Task Force for your organization? Who possesses this expertise and these talents?

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## Assessment of Organizational Volunteer Engagement

YOU . . .	Score 1 if you . . .	Score 2 if you . . .	Score 3 if you . . .
<b>Organizational Support for Volunteers</b>			
Involve volunteers in all aspects of organizational life.	Have staff and/or a few dedicated volunteers do most of the work.	Have a volunteer presence in all aspects of organizational activities and programming.	Mandate that staff and leadership utilize volunteers in their work.
Allocate resources, including budget, space, and tools, for volunteer engagement.	Assume that volunteers are “free” and do not require resources.	Have a budget for volunteer resources.	Reflect in your annual budget detailed expenses for volunteers, including supplies, space, software, training, recruitment, staff time, and recognition.
Train staff and board leadership to work effectively with volunteers.	Assume staff and key leadership know how to work with volunteers.	Reflect responsibility for volunteer engagement in staff and lay leadership position descriptions.	Provide formal training to staff and lay leadership on how to work with volunteers.
<b>Needs Assessment and Program Planning</b>			
Have defined why volunteers are a strategic priority for the organization.	Use volunteers for activities and programs as they are needed.	Have identified volunteers as leaders and helpers in moving the organization forward.	Have a written philosophy statement about volunteer engagement that identifies volunteers as an indispensable channel for ideas on organizational direction and operations, programs, and activities.
Include volunteer engagement in risk management planning.	Do not consider volunteer assignments in your risk assessment.	Evaluate all volunteer assignments for risk.	Have appropriate insurance for volunteer engagement and evaluate/update as necessary.
<b>Effective Recruitment and Cultivation</b>			
Have written position descriptions for all volunteer assignments.	Verbally explain to volunteers what they are going to do.	Have a position description for each volunteer assignment.	Conduct an annual (at minimum) review and update of all position descriptions.
Have a process for volunteer cultivation.	Do recruitment exclusively through announcements in the newsletter, website postings, etc.	Figure out who knows prospective volunteers and have them do the recruiting.	Have a written strategic recruitment plan for all volunteer assignments and needs.
Maintain current and accurate records on volunteers.	Do not track volunteer involvement.	Have a record of all volunteers and what they do for the organization.	Integrate volunteer records with membership and donor information.

To score your answers, see page 37

YOU . . .	Score 1 if you . . .	Score 2 if you . . .	Score 3 if you . . .
<b>Interviewing and Placement</b>			
Design volunteer assignments for a wide range of skills, ages, and interests.	Rely on a specific group of volunteers (e.g., stay-at-home mothers, retired, etc.) to get the work done.	Include all age groups and demographics among your volunteers.	Design assignments specifically to reflect a wide range of skills and interests and not limit work to clerical and administrative positions.
Screen and place volunteers in assignments that are right for them and the organization.	Let anyone volunteer for anything.	Match volunteers to the assignment that aligns with their interests.	Recruit volunteers based on their preferences, the skills they willingly share, and the relevant qualifications for the job.
<b>Orientation and Planning</b>			
Have written policies and procedures for volunteer engagement.	Assume that volunteers know what is acceptable for them to do.	Have some policies that relate to volunteer involvement.	Have detailed written policies and procedures and orient all volunteers to these guidelines.
<b>Supervision and Support</b>			
Hold volunteers accountable for what they do.	Cannot fire a volunteer.	Clarify for volunteers the limits and boundaries of their assignments.	Have staff and leadership follow up with volunteers to make sure they accomplish what they set out to do, releasing them as needed.
Actively solicit volunteer input in decisions that affect them.	Have volunteers do whatever they are assigned.	Encourage current volunteers to give feedback.	Have a system in place for collecting and reflecting on volunteer feedback on decisions that affect them.
<b>Strategies for Sustainability (Retention)</b>			
Have volunteer assignments that are meaningful and that impact the ability of the organization to achieve its mission.	Design volunteer assignments around having people do the work of the staff and/or board of directors.	Design volunteer assignments to have an impact on the mission of the organization.	Reflect a diversity of work in volunteer assignments, from direct service to program delivery, and incorporate high-level assignments, such as the provision of professional services.
Ensure that staff and leadership recognize volunteers informally and formally.	Host an annual recognition event for volunteers.	Give frequent recognition to volunteers from the board, staff, and other volunteer leaders.	Acknowledge the successes of volunteer endeavors in personalized ways through sharing celebratory information in collateral materials (e.g., the website, newsletters, announcements, emails, and written materials), through letters, and through customized networking opportunities with organizational leaders and others.



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## Needs Assessment

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1. What are the dreams for your organization that require more people, expertise, money, or tools to accomplish?

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2. What are the problems and challenges that your organization is currently experiencing?

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3. What is your nonprofit currently doing that you would like to increase, replicate, or expand?

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4. What is an area of your division/  
department that is always underutilized  
or understaffed, or seems constantly  
overloaded?

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5. What specific skills and resources  
would your organization's personnel  
need to fulfill your dreams? To meet  
its challenges?

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6. Who in your circles of influence  
embraces volunteers and would be  
open to building the organization's  
capacity to address these dreams and  
challenges?

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7. Who are your Mavens? Who are the experts on volunteering? On projects your organization wants to begin or complete?

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8. Who are your Connectors? Who seems connected to everyone in particular communities you want to tap? (Which communities?)

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9. Who are your Salespeople? Who can sell someone the shirt off her back and make her glad to buy it?

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10. Are you an answer to any of the previous three questions? (Which ones? Why?)

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11. With what could your organization utilize a consultant or specialist to help you—now and in the future—work toward vision and mission fulfillment?

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12. What areas of your organization would benefit from program outcome evaluation?

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Based on these Needs Assessment data, what are three entrepreneurial volunteer assignments or volunteer leadership positions that would be an asset to you and your organization?

**1.** \_\_\_\_\_  
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**2.** \_\_\_\_\_  
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\_\_\_\_\_  
\_\_\_\_\_

**3.** \_\_\_\_\_  
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\_\_\_\_\_  
\_\_\_\_\_

 **Work Plan**

<b>Vision Statement</b>	<b>Resources</b>	<b>Action</b>	<b>Yield</b>	<b>Initial Impact</b>	<b>Sustained Outcome</b>



# PROGRESS REPORT

**Vision:** \_\_\_\_\_

Element	Description	Indicators and Tools	Progress, Challenges, and Needs
Resources			
Action			
Yield			
Initial Impact			
Sustained Outcome			







Title, Description	Commitment	Considerations	Existing Positions We Could Retool and Ideas to Get It Done
<p><b>Team Volunteering</b> A group of self-directed volunteers taking on a project, program, or assignment</p>	<p>Time limited or ongoing</p> <p>Episodic or short-term</p>	<ul style="list-style-type: none"> <li>• Relationship</li> <li>• Community</li> <li>• Self-direction</li> <li>• Accountability</li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p><b>Consultant</b> Providing professional skills and content expertise to the organization</p>	<p>Usually time limited</p> <p>Schedule based on volunteer availability</p> <p>Could be episodic</p> <p>Could be virtual</p>	<ul style="list-style-type: none"> <li>• Skill level</li> <li>• Experience</li> <li>• Communication</li> <li>• Relationship</li> <li>• Self-directed</li> <li>• Autonomy</li> <li>• Strategic thinking</li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
<p><b>Virtual</b> Providing services to the organization from off-site location, utilizing technology such as phone, fax, Internet, or email</p>	<p>Schedule own time</p> <p>Time limited or ongoing</p>	<ul style="list-style-type: none"> <li>• Autonomy</li> <li>• Self-direction</li> <li>• Relationship</li> <li>• Communication</li> <li>• Skill level</li> </ul>	<hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>



# Volunteer Position Description

## Position Overview

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**Title:** \_\_\_\_\_  
\_\_\_\_\_

**Key responsibilities:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Initial impact:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Sustained outcomes:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Training:** \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Support:**

**Commitment:**

**Length of time:**

**Amount of time:**

**Specify evenings, weekdays, weekends:**

**Location of volunteer assignment:**

**Qualifications:**

**Skills:**

**Benefits:**



## Case Statement for Boomer Volunteer Engagement

**Element**

**Your Case Statement**

**Background** on how initiative began and why it is a strategic priority

**Connection** to organizational mission and vision

**Financial supporters,** including stakeholders and powerful allies

**Examples:** success stories and exemplary programs and services







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## Motivational Analysis

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Adapted with permission from *The Volunteer Development Toolbox: Tools and Techniques to Enhance Volunteer and Staff Effectiveness* by Gail Moore and Marilyn MacKenzie.

Each of the following sets of statements offers three choices. Check the one that most closely fits your own motivations. Remember, there are no wrong answers.

1. \_\_\_ a. When doing a job, I seek feedback.  
\_\_\_ b. I prefer to work alone and am eager to be my own boss.  
\_\_\_ c. I feel less comfortable when forced to work alone.
2. \_\_\_ a. I go out of my way to make friends with new people.  
\_\_\_ b. I enjoy a good argument / debate.  
\_\_\_ c. After starting a task, I am not comfortable until it is completed.
3. \_\_\_ a. Status symbols are important to me.  
\_\_\_ b. I am always getting involved in group projects.  
\_\_\_ c. I work better when there is a deadline.
4. \_\_\_ a. I work best when there is some challenge involved.  
\_\_\_ b. I would rather give orders than take them.  
\_\_\_ c. I am sensitive to others—especially when they are angry.
5. \_\_\_ a. I am eager to be my own boss.  
\_\_\_ b. I accept responsibility eagerly.  
\_\_\_ c. I try to develop a personal relationship with my teammates.
6. \_\_\_ a. I am uncomfortable when forced to work alone.  
\_\_\_ b. I prefer being my own boss, even when others feel a joint effort is required.  
\_\_\_ c. When given responsibility, I set measurable standards of high performance.
7. \_\_\_ a. I am very concerned about my reputation or position.  
\_\_\_ b. I have a desire to outperform others.  
\_\_\_ c. I am concerned with being liked and accepted.
8. \_\_\_ a. I enjoy and seek warm, friendly relationships.  
\_\_\_ b. I attempt complete involvement on a project.  
\_\_\_ c. I want my ideas to predominate.

9. \_\_\_a. I desire unique accomplishments.  
\_\_\_b. I like to work with others.  
\_\_\_c. I have a need and desire to influence others.
10. \_\_\_a. I think about consoling and helping others.  
\_\_\_b. I am verbally fluent.  
\_\_\_c. I am restless and innovative.
11. \_\_\_a. I set goals and think about how to attain them.  
\_\_\_b. I think about ways to challenge people.  
\_\_\_c. I think a lot about my feelings and the feelings of others.

**Key: Check your answers. The style with the most answers is your primary style.**

- |  |  |   |
|--|--|---|
| 1. a. Achievement<br>b. Power<br>c. Affiliation  | 2. a. Affiliation<br>b. Power<br>c. Achievement  | 3. a. Power<br>b. Affiliation<br>c. Achievement |
| 4. a. Achievement<br>b. Power<br>c. Affiliation  | 5. a. Power<br>b. Achievement<br>c. Affiliation  | 6. a. Affiliation<br>b. Power<br>c. Achievement |
| 7. a. Power<br>b. Achievement<br>c. Affiliation  | 8. a. Affiliation<br>b. Achievement<br>c. Power  | 9. a. Achievement<br>b. Affiliation<br>c. Power |
| 10. a. Affiliation<br>b. Power<br>c. Achievement | 11. a. Achievement<br>b. Power<br>c. Affiliation |   |



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## Interview Questions

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### 1. Problem-Solving Question

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### 2. Situational Question

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### 3. Experiential Question

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### 4. Skills Question

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## Acknowledgment Tailored to Motivation

Motivation	Characteristics	Acknowledgment
<b>Achievement</b>	<ul style="list-style-type: none"><li>• Look for projects with a beginning, middle, and end</li><li>• Want clear, concrete feedback</li><li>• Are interested in assignments with the opportunity to solve problems</li><li>• Seek assignments that are time limited</li><li>• Want control over the outcome of the work</li></ul>	<ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li><li>4.</li><li>5.</li></ol>
<b>Power</b>	<ul style="list-style-type: none"><li>• Seek assignments with significant and definable impact</li><li>• Desire to have influence</li><li>• Want to share their ideas</li><li>• Are interested in prestige, status, and position</li></ul>	<ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li><li>4.</li><li>5.</li></ol>
<b>Affiliation</b>	<ul style="list-style-type: none"><li>• Are interested in being with others</li><li>• Friendship and relationships are a top priority</li><li>• Desire a warm, friendly, and supportive work environment</li><li>• Demonstrate concern and caring for others</li><li>• Relationships may be more important than the work itself</li></ul>	<ol style="list-style-type: none"><li>1.</li><li>2.</li><li>3.</li><li>4.</li><li>5.</li></ol>



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## Individual Volunteer Plan (IVP)

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Volunteer's Name: \_\_\_\_\_ Date: \_\_\_\_\_

Support Liaison (Supervisor): \_\_\_\_\_

### Current Competencies

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

### Goals and Benchmarks

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

**Additional Needs**

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_
6. \_\_\_\_\_

**Signatures**

Volunteer: \_\_\_\_\_

Supporter (Supervisor): \_\_\_\_\_

Executive Director: \_\_\_\_\_

Board Chair: \_\_\_\_\_

**Updates:** \_\_\_\_\_

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**Date for Next Progress Review:** \_\_\_\_\_

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