



# Guide to Forms

## Marshfield Clinic AmeriCorps Volunteer Wisconsin

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While best practices for volunteer management are well established, there is no one system that will work in every setting. The needs of an organization will dictate the optimal volunteer management process. Large organizations with many volunteers may create a more formal program than a small community-based food pantry. Reference and background checks will be important in organizations serving client populations, but may not be necessary for one-time special event volunteers.

This material was developed using a variety of resources and experience. It is designed for volunteer programs utilizing volunteers on an ongoing basis, however it can be adapted for special event volunteers as well. This format will help staff think through the needs of the organization and then customize a process to best serve the mission.

The forms are on <https://cco.marshfieldclinic.org/> so they can be easily changed. The agency name and logo can be added, as well as agency-specific information to make them more useful. Any irrelevant information can be removed. Everyone will benefit from a volunteer management system that is developed for the organization's specific needs. These forms will be a great place to begin a volunteer program, and save hours of time creating material.

Below is a brief description of each form and some suggestions for use. Copies of the forms are attached and they are also found online.

**Volunteer Management Policies** - Policies will provide the volunteer program foundation and will include the purpose for utilizing volunteers, definition of volunteers and the requirements for volunteering. The policies here are just a suggestion and will help you think about the needs of your organization. Some policies may include the specific criminal background that would disqualify someone from volunteering. Look at the Human Resources policies for ideas on other items that should be included.

**Volunteer Procedures** - This will formalize the process for interviewing and placement of volunteers. Not every volunteer will be a good fit, however, by following set procedures you will best serve both the volunteer and the organization. Every item on this list should be addressed in some way, either formally or informally depending upon the organization.

**Volunteer Position Description** - A written position description will ensure that staff and volunteers all have the same expectations. All volunteer duties should be planned and qualifications outlined. Be sure that the staff who supervise volunteers have input in creating the position description, then revise the form when circumstances change.

**Volunteer Application** – This form, which may be called an application or information sheet, is used to collect information on all volunteers. It will be valuable in screening and interviewing and will help assess the best utilization of the volunteer's skills. Only include questions that are necessary. Use the checklist at the bottom to be sure that the procedures are followed for each volunteer. For one-time volunteers you may only need the top 5 lines on the form.

**Volunteer Interview Questions** – Each interview begins with the first conversation that occurs with the volunteer. *Why do they want to volunteer? What skills do they want to use? When is the volunteer available?* A good phone screening can save time as the Volunteer Manager determines if this person is a good fit for the organization. If they meet your initial criteria, have them complete an application and plan a face-to-face interview. Use the information from the application to get to know the volunteer, then follow up with established interview questions. Use questions that uncover the volunteer's motivation, their experience and interest in the organization. This is the best time to determine whether or not to move forward. If a volunteer does not meet the basic requirements, now is time to let them know. It will be easier to say NO now, than to have problems later. The interview with event volunteers will be brief to ensure they are available and can perform the duties.

**Volunteer and Agency Agreement** - Volunteers are a wonderful resource for an organization, but they also require time for training and supervision. This document will help both parties understand what is required to make the relationship successful. If there is a minimum commitment, a specific number of hours or weeks, you can include it here.

**Reference Sheet** - It is important to verify information and learn more about volunteers in some positions, especially those who will be volunteering with clients or students.

**Volunteer Sign-In** - Keep track of the volunteer hours, either through a sign-in sheet or electronic system. This will help with recognition and also to acknowledge the total contribution made by volunteers.

**Volunteer Satisfaction Survey** - Every volunteer wants to know that they are doing a good job. This can be accomplished through a formal evaluation or informal acknowledgement of their efforts. It is especially important to evaluate a volunteer at the beginning of their service to reinforce what is going well and to coach them on areas for improvement. This form can be used for formal evaluation or help guide an informal conversation. First complete the form and then meet together for discussion. Another option is to have the volunteer also complete the form before a meeting.