



Marshfield Clinic Health System AmeriCorps Volunteer Wisconsin Organizational Capacity Assessment

Date: _____

Completed By: _____

Non-Profit Organization: Click to select from drop-down list

*If your organization is not listed,
enter organization name here:*

Program: _____

(If applicable)

Instructions

The Organizational Capacity Assessment is designed to help AmeriCorps Host Sites evaluate their current Volunteer Management Practices and identify areas for improvement. Improving these practices will increase your organization's ability to provide services. Complete **one** Assessment for each program that will utilize a Volunteer Wisconsin member. Answer each question thinking about the area of influence your AmeriCorps member will have during their term of service. If your organization has many programs but your member's work will be within a specific program, then complete the assessment thinking about that program's Volunteer Management Practices rather than the whole organization's use of volunteers. They may differ.

The Assessment will also be used to develop the Service Plan for your AmeriCorps member, to identify topics for future trainings, and as an evaluation tool for grant reporting. **It is VERY important that you give this assessment adequate time and thought to complete.** Please be as accurate and honest as possible. In a national survey, only 17% of nonprofits reported they were "strong" in volunteer management behaviors so don't inflate your evaluations. The goal is *not* that your organization achieves a high rating in this Assessment, but that you gain a realistic view of the areas where your organization has opportunities to grow -- the areas your AmeriCorps member can work on to strengthen.

When you have finished with the Assessment in **Step 1**, you will have an opportunity in **Step 2** to identify areas that could be strengthened to help develop your plans for the coming year.

Assessments are due **August 28, 2019**

Submit your completed Assessment to: Shelly Kaiser at kaiser.shelly@marshfieldclinic.org.

When you have completed the Assessment, *print* a copy for your records. You will bring this assessment to orientation September 12 to begin developing your AmeriCorps member's service plan.

Thank you!

Step 1 - Self-Assessment: Assess your organization’s volunteer engagement by checking the level of competence that best describes your actual procedures related to the eight practice areas below. Each practice area has 2-4 activities with options that range from a minimal level to an exceptional level of competence. *Please, only check one box per set.*

Optional for returning host sites only. Please use my responses from the 2018-2019 Post-Organizational Capacity Assessment which I recently submitted. I understand I still need to complete **Step 2** on page 5.

Practice Area 1. Market Research and Community Needs Assessment.

a. Community Understanding: Organization understands the availability and interests of community volunteers. Check one:

- The organization believes that volunteers are a valuable resource to achieve their mission, yet has no information on local volunteers.
- Organization has a basic understanding of local volunteers that is used in planning.
- The organization applies knowledge and research about volunteers in planning overall volunteer engagement.
- The volunteer engagement plan reflects annual trends in the availability and interests of volunteers. Volunteers are a source of information about community needs.

b. Needs Assessment and Opportunity Design: The organization has identified the need for volunteers and leverages them throughout the organization utilizing position descriptions. Check one:

- Organization engages volunteers without a formal needs assessment or position descriptions.
- Some agency priorities are translated into objectives for volunteers in generic written position descriptions.
- As organizational and community priorities change, volunteer activities are created and updated with specific written descriptions outlining the duties, skills, and outcomes.
- With well-defined position descriptions, volunteers are engaged in all levels of the organization including skills-based, project, management, administrative, direct service, and group opportunities to meet the organization’s goals and mission.

Practice Area 2. Strategic Planning to Maximize Volunteer Impact - ensuring that volunteerism is an organization strategy.

a. Strategic Plan: The organization’s strategic plan includes the integration of volunteers. Check one:

- Volunteers are not included in the organization’s strategic plan and there is no volunteer program plan.
- Volunteers are engaged on an as-needed basis with short-term plans.
- The organization has a philosophy related to volunteer involvement that articulates why volunteers are wanted. Best practices are utilized in volunteer engagement.
- The Executive Director and Board endorse the engagement of volunteers in tangible ways and volunteers are evident in the organization’s long range strategic plan.

b. Resources: Resources are strategically allocated to the priorities of the organization, including the engagement of volunteers. Check one:

- There is not adequate funding to support the engagement of volunteers.
- Volunteer engagement is not evident in the organization’s budget, but is funded through department budgets.
- Staff time is specifically allocated to the recruitment and management of volunteers with responsibilities and outcomes outlined in a job description.
- The organization’s budget includes adequate funding for volunteer engagement, including a volunteer resources manager with professional development opportunities and status equal to other management staff.

c. Policies and Procedures: To provide a framework that defines and supports volunteer involvement. Check one:

- Volunteer engagement policies are informal and not part of the organization's policies and procedures.
- Written volunteer engagement policies are aligned with the organization's policies.
- Policies include managing and mitigating potential risk factors; including volunteer training, background checks and insurance.
- Policies and procedures are developed and updated according to best practices, are followed consistently and are communicated to all staff.

Practice Area 3. Recruiting and Marketing to Prospective Volunteers - with targeted recruitment to meet the organization's needs.

a. Variety: A variety of strategies are used to recruit a diverse volunteer force. Check one:

- Volunteer recruitment is informal.
- All staff participate in promoting volunteer engagement, and information is included in all of the organization's materials, including the website.
- Genuine effort is made to recruit and select a broad range of volunteers from diverse backgrounds and with various skills, including skill-based and project volunteers.
- A variety of recruitment strategies are used including the local Volunteer Center or Volunteer Wisconsin, printed material, social media, corporate volunteer programs, service learning programs and single days of service promotions.

b. Messaging: Recruitment messages are designed to attract volunteers and articulate their duties. Check one:

- Generic messages are used to recruit all volunteers.
- There is a unique recruitment message for each opportunity and audience.
- Messages sell the position to applicants and are realistic and clear about volunteer expectations and impact.
- Recruitment messages are customized for various recruitment methods and are analyzed for effectiveness so appropriate changes can be made.

c. Partnerships: Collaboration with other organizations to recruit volunteers to meet the mission. Check one:

- Partnerships are not pursued, yet the organization is open to these opportunities.
- The organization partners with groups for service days.
- The organization builds relationships with companies, groups, congregations, funders, schools, universities and others to provide volunteer support beyond single days of service.
- Building partnerships is included in the strategic plan to develop both volunteer and financial support for the organization.

Practice Area 4. Interviewing, Screening and Selecting Volunteers - to ensure the best fit for the volunteer and the organization.

a. Interview and Match: The organization interviews all ongoing volunteers and matches them with appropriate positions within the organization. Check one:

- Volunteers are utilized with only a sign-up required.
- A consistent format is used to interview volunteers in person or over the phone to determine their skills and interests.
- Volunteers are placed in opportunities that match their skills, interests and motivation and there is a protocol for rejecting inappropriate volunteers.
- Clear understanding regarding duties and expectations is achieved with signed agreements.

b. Screening: The organization screens volunteers to ensure their suitability. Check one:

- There are no policies or screening procedures in place.
- Volunteers are screened at the discretion of the volunteer manager.
- Policies exist for background checks and screening, but they may not be up to date.
- Reference and background screening policies are updated (based on a risk management approach), are clearly communicated and consistently applied.

c. Process: The sign-on process is thorough, yet flexible to meet the needs of the organization and the volunteer. Check one:

- An informal process is used at the discretion of staff.
- A protocol is developed that includes application, interview, screening and background checks. The same format is used for all volunteers.
- Volunteer inquiries are responded to within 24 hours. The onboarding process is flexible with elements to meet the needs of different volunteer types (event, skill-based projects and ongoing).
- The organization meets the above criteria and reviews the process annually to accommodate changes in the organization, technology and trends in volunteer engagement.

Practice Area 5. Orienting and Training Volunteers - to help them get off to a good start.

a. Orientation: Volunteers are oriented to the organization. Check one:

- Each volunteer is oriented with information on an as-needed basis.
- The site supervisor provides a standard orientation.
- Volunteers receive a handbook and a standardized orientation which includes key organizational information. Items are updated based on changing needs and feedback.
- The orientation is streamlined using video or on-line tools for volunteers serving in short term roles, as well as groups and remote volunteers.

b. Training: Volunteers are trained to ensure success in their roles. Check one:

- Volunteers are trained on an as-needed basis.
- Each volunteer receives introductory training specific to their role.
- A standard training protocol is used to set clear expectations and answer questions.
- Volunteers receive continued training, including in-service and training along with staff.

Practice Area 6. Ongoing Supervision and Management - for retention and high quality outcomes.

a. Trained Supervisors: The organization has a trained supervisor designated to support each volunteer role. Check one:

- Volunteers are not assigned a specific supervisor.
- Volunteers have a designated supervisor, however supervisors are not trained.
- Staff receive training on the effective supervision of volunteers.
- All volunteers, including skill-based, remote, and committee volunteers have a designated supervisor and a back-up in their absence. Supervisors receive standardized training in effective volunteer engagement. All staff understand the value of volunteers.

b. Coaching and Development: Volunteers continue to develop and grow within the organization. Check one:

- Volunteers typically stay in the same role and do not advance to other positions.
- Volunteers are coached on a regular basis to gain skills and to ensure they are successful.
- Regular communication is maintained to coach volunteers, address concerns and resolve conflict.
- There is a plan for volunteers to develop skills and gain greater responsibility within the organization.

c. Communication: There is regular communication with volunteers using a variety of methods. Check one:

- No special effort is made to communicate with volunteers.
- Volunteers receive some publications from the organization and information from their department.
- Volunteers are included in all electronic and print communication from the organization.
- A specific newsletter and a variety of communication methods inform, recognize, and keep volunteers engaged. Volunteers receive information about the organization before it is released to the public.

Practice Area 7. Recognition and Volunteer Development - to help retain volunteers.

a. Recognition: Volunteers are recognized using a variety of methods. Check one:

- There is no volunteer recognition plan other than regular thanks from the staff.
- Volunteer recognition is included in the budget and is designed to appeal to the volunteers.
- Volunteers receive frequent formal and informal recognition using a variety of methods, including the acknowledgement of senior management.
- There is a written volunteer recognition plan, the organizational climate values volunteers and is conducive to productive volunteer involvement.

b. Value: The effort of volunteers and value of their work is recognized throughout the organization. Check one:

- The overall value of volunteers is not determined.
- The value and impact of volunteer contributions are understood and communicated to the volunteers and throughout the organization.
- The Board receives a regular report on the value and impact of volunteers.
- The impact of volunteer work and the dollar return on volunteer investment are conveyed through facts and stories to staff and the community.

Practice Area 8. Measuring Outcomes and Evaluating the Process - to ensure ongoing success.

a. Evaluate Volunteers: Volunteers are evaluated on a regular basis. Check one:

- Volunteer hours and activities are tracked but performance is not addressed.
- Volunteers receive informal oral feedback on the quality of their work. Concerns are addressed as needed.
- Volunteers are evaluated using a standard format which is recorded.
- Volunteers are formally evaluated on a regular basis and based on their performance and interests, are advanced to new positions and given additional responsibilities to meet organizational needs.

b. Volunteers Provide Feedback: Volunteers evaluate their experience in the organization. Check one:

- There is no mechanism for volunteers to make suggestions.
- Supervisors are open to informal feedback from the volunteers.
- The volunteer manager seeks specific feedback from the volunteers.
- Volunteers have a regular mechanism for offering suggestions and opinions and evaluating their volunteer experience. The information is used to improve volunteer engagement.

c. Volunteer Program is Evaluated: The organization evaluates the volunteer engagement process and the impact of volunteers. Check one:

- The volunteer management process has not been evaluated and volunteer impact is not measured.
- Volunteer hours are tracked and a value is placed on them.
- Current volunteer management best practices are followed and updated regularly.
- A formal assessment of the volunteer engagement process is conducted regularly. Volunteer outcomes are measured.

d. Tracking: A volunteer tracking system is used to collect data. Check one:

- Informal records are kept on each volunteer.
- Records are kept using a secure system that records demographic information, hours contributed, retention, training and other relevant information.
- Organization has identified, obtained and applied appropriate technology to measure, manage, and analyze volunteer engagement.
- Statistical information about volunteer engagement is regularly analyzed and shared with staff and volunteers, and is used to improve overall volunteer engagement strategies.

Step 2 - Focus Areas: First, select 3 of the 8 practice areas where you see room for growth and want to focus your member’s efforts during the upcoming year.

Next, check activities within the 3 chosen practice areas where you want to further focus your efforts. Choose your activities based on items that you believe will have the greatest impact on your organization. You may check as many activities with each chosen practice area as fit your needs (just one or all of them).

Practice Areas (Check 3)		Activities (Check the box[es] that apply)
<input type="checkbox"/>	1. Market Research and Community Needs Assessment	<input type="checkbox"/> a. Community Understanding <input type="checkbox"/> b. Needs Assessment and Opportunity Design
<input type="checkbox"/>	2. Strategic Planning to Maximize Volunteer Impact	<input type="checkbox"/> a. Strategic Plan <input type="checkbox"/> b. Resources <input type="checkbox"/> c. Policies and Procedures
<input type="checkbox"/>	3. Recruiting and Marketing to Prospective Volunteers	<input type="checkbox"/> a. Variety <input type="checkbox"/> b. Messaging <input type="checkbox"/> c. Partnerships
<input type="checkbox"/>	4. Interviewing, Screening and Selecting Volunteers	<input type="checkbox"/> a. Interview and Match <input type="checkbox"/> b. Screening <input type="checkbox"/> c. Process
<input type="checkbox"/>	5. Orienting and Training Volunteers	<input type="checkbox"/> a. Orientation <input type="checkbox"/> b. Training
<input type="checkbox"/>	6. Ongoing Supervision and Management	<input type="checkbox"/> a. Trained Supervisors <input type="checkbox"/> b. Coaching and Development <input type="checkbox"/> c. Communication
<input type="checkbox"/>	7. Recognition and Volunteer Development	<input type="checkbox"/> a. Recognition <input type="checkbox"/> b. Value
<input type="checkbox"/>	8. Measuring Outcomes and Evaluating the Process	<input type="checkbox"/> a. Evaluate Volunteers <input type="checkbox"/> b. Volunteers Provide Feedback <input type="checkbox"/> c. Volunteer Program is Evaluated <input type="checkbox"/> d. Tracking

Comments: Use the space below for clarification or additional information.

Reminder: Print a copy for your records and please bring along to orientation.