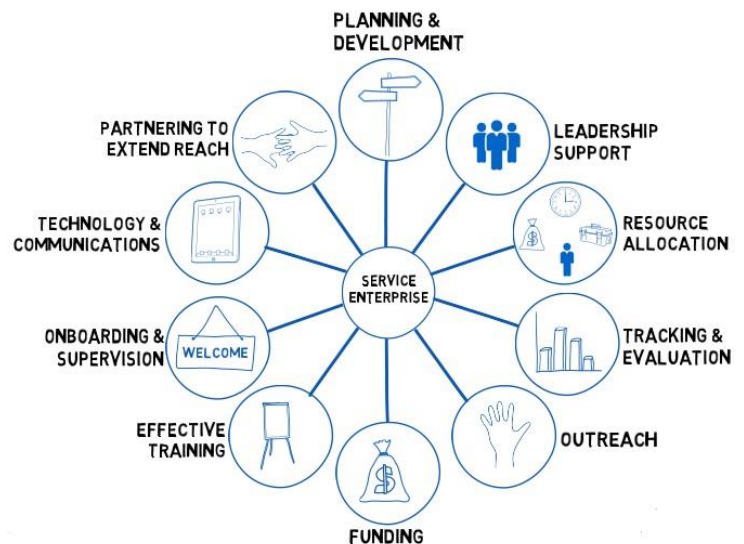


# SERVICE ENTERPRISE CHARACTERISTICS

Research shows that organizations operating as Service Enterprises exhibit ten characteristics. Below is a list of the characteristics and ideas for ways organizations can demonstrate these practices inside their organization.

**Planning and Development** – Develop a strategy and infrastructure for mission-driven volunteer engagement.

- Volunteer opportunities are based on organizational mission and needs.
  - Organization has an ongoing process for defining needs and determining staffing options.
  - Appropriate resources for volunteer support and oversight are allocated when volunteer positions are created.
- Volunteer roles are clearly and thoughtfully defined.
  - A variety of volunteer opportunities (skilled, unskilled, one-time, short-term, ongoing) are considered as positions and are defined.
  - Duties and expectations for each volunteer are documented and communicated to volunteers and staff.
  - Volunteer roles are revised as needed based on data collected about organizational mission outcomes.



**Leadership Support** – Demonstrate executive commitment to volunteer engagement

- Board members recognize themselves as volunteers, demonstrate support and hold leadership accountable for strategic volunteer engagement.
  - Agency strategic, programmatic and/or business plan clearly documents volunteer engagement as a strategy to meet mission and goals of organization.
  - Value of volunteer services and or return on volunteer investment are tracked annually and reported to the board of directors.
  - Performance evaluations for executive director and other staff include accountability for volunteer engagement.
- Volunteer engagement is measured, recognized and shared regularly with board of directors and throughout the organization and the community.
  - Volunteer contributions are a part of regular report to Board of Directors as evidenced by board report documentation.
  - Organization newsletters and program press releases highlighting volunteer contributions are regularly distributed to board.
  - Annual report includes volunteer engagement.

- Recognition plan provides for personal and public appreciation of the volunteer(s).
- Executive leadership embraces volunteerism as a critical function of the agency.
  - Executive participates in the Service Enterprise transformation and certification process as documented by training sign in sheet, signed MOU with Service Enterprise Hubs or other.
- Leadership supports strategic volunteer engagement as a mechanism to support organization-wide volunteer efforts.
  - Organization has training for all staff on volunteer engagement.
  - Organizational chart clearly shows volunteer roles are integrated throughout the organization.
  - Position description(s) include volunteer engagement as a role.
- Leadership fosters a culture that embraces strategic volunteer engagement and volunteers. Their work and ideas are respected through the organization.
  - Culture of volunteerism is reflected in mission, vision, guiding principles or values statement.
  - Volunteers are invited to staff meetings and events, as well as kept informed of changes in the organization as appropriate.
- Organization has documented organization-wide volunteer engagement practices and policies and those policies are shared with volunteers.
  - Agency volunteer handbook outlines volunteer policies.
- Leadership inspires volunteers by providing opportunities for volunteers to connect with other volunteers, staff and leadership.
  - Volunteers are invited to attend trainings and to participate in organizational meetings and events as appropriate.
- Leadership is intentional about recognizing volunteer contributions and successes both inside and outside the organization.
  - Annual report includes volunteer engagement.
  - Recognition plan provides for personal and public appreciation of the volunteer program.

**Resource Allocation** – Allocate sufficient resources (time, money, people, tools) to volunteer engagement.

- Organization documents Return on Investment (ROVI) for volunteer engagement.
- Organization allocates facilities, tools and resources for volunteer engagement and accounts for all volunteer engagement expenses to include but not be limited to salaries, recognition activities, training, technology, tracking systems, etc.
  - Strategic, business, and/or business plans define resources and funding for volunteer integration.
  - Budget demonstrates money is allocated for volunteer engagement.
- Organization allocates resources for engaging volunteers to build capacity and provide support for agency's internal functions.

- Organization creates position description for capacity building volunteers.

**Tracking and Evaluation** – Track the outputs and outcomes of volunteer contributions and monitor the quality of the volunteer experience.

*Note: A tracking system provides the organization with quantitative information on volunteer retention, hours dedicated per year and hours dedicated over a lifetime. The evaluation of volunteers and volunteer services provides qualitative information on the value of the service of volunteers.*

- Organization has a process to provide ongoing feedback to volunteers and provides volunteers with an opportunity to give feedback to the organization.
  - Volunteer satisfaction survey includes volunteer feedback on program and/or organization.
  - There is a volunteer performance review process.
  - Volunteers are included in staff meetings and program meetings.
- Organization has a volunteer tracking system that supports effective management of volunteer information, provides information on volunteers including demographic information, retention, hours dedicated per year and over a lifetime, helps assign a value (i.e., points to recognize time spent, training completed, etc.) to any given volunteer as well as to the whole group.
  - Documentation demonstrates organization uses a volunteer tracking system.
  - Documentation demonstrates that the organization measures, tracks and communicates volunteer service value.
- Organization collects and communicates quantitative and qualitative data that tells the story of how volunteers help the organization achieve its mission.
  - Evaluation plan outlines how volunteers help organization achieve service outputs and outcomes.
  - Organization tracks organizational changes and/or personal changes as a result of volunteer involvement.

**Outreach** – Conduct outreach and volunteer recruitment to sustain ongoing volunteer engagement.

- Organization has a documented volunteer outreach and recruitment plan that represents the diversity of the communities served
  - A document outlines recruitment plan.
  - The organization is flexible in how volunteers can get involved including virtual, micro volunteering, one time, skills based, etc. as documented by various position assignments and recruitment posting.

- Organization provides volunteers with an opportunity for volunteer advancement within the organization (volunteer ladder of leadership and engagement) and/or volunteer position mastery.
  - A document outlines plan for volunteers to move into new/different positions.
  - A document outlines plan for volunteers to achieve a level of excellence in a position.

**Funding** – Raise funds to support volunteer engagement.

- Organization effectively fundraises to support sustained volunteer engagement and management.
  - Fund development plan that includes fundraising for volunteer engagement and ongoing support.
  - ROVI is measured and reported to board and to volunteers in newsletter and/or annual report to public as appropriate.
  - Documented opportunity for volunteers to contribute to the organization financially.
  - Funding proposal or grant application documents Volunteer ROVI and requests monies to support volunteer engagement.

**Effective Training** – Train volunteers and staff on their respective roles and equip them to work with each other.

- Volunteer manager receives professional development opportunities.
  - Volunteer manager has a professional development plan.
  - Professional development is included as category on performance review forms.
- Staff and volunteer leaders receive training on how to effectively engage volunteers.
  - Volunteer manager position description outlines training staff as part of his/her role.
  - All staff, including any national service members or interns, are required to complete volunteer management training.
- Organization provides volunteers with orientation to the organization and adequate training to successfully perform position.
  - Standardized volunteer training curriculum is aligned with volunteer position.
  - There is a volunteer orientation document.

**Onboarding and Supervision** – Match volunteers to appropriate positions, clarify their roles and orient and support them throughout their service tenure.

- Organization screens volunteers and matches volunteers to positions that align with volunteer skills and interests.
  - Documentation demonstrates that the organization has a formal screening process.
  - Organization has volunteer interview questions and/or selection criteria.
  - Organization provides volunteer application and/or intake form.
- Volunteers have an identified supervisor, understand their roles and expectations, and have a formal review process.

- Organization chart showing organizational structure and lines of supervision.
- Volunteer position descriptions identify supervisor.
- Staff job description outlines supervision of volunteers as a function.
- Volunteer management system complies with all applicable laws and organizational policies which may include fundraising, financial accountability, licensing, HIPPA, advocacy and taxation.
  - Volunteer Handbook includes:
    - Policy that details how volunteers confidentially report any concerns about all laws that need to be followed to protect organization and clients
    - Gift acceptance policy
    - Volunteer laws and insurance coverage or requirement
    - Laws or policies that are applicable to the organizational mission and populations served (ex. HIPPA, required background checks)
- Organization has a current risk assessment process in place for protection of the volunteer and organization as well as prevention of injury.
  - Organization has a volunteer risk assessment plan.
  - Organization has a volunteer position risk assessment.
  - Organization has training and/or record of communications related to risk management for volunteers.
  - Organization has a documented background check process and resources as appropriate.
  - Policies and procedures are reviewed and updated annually.
- Organization has a recognition plan and recognizes all types of volunteers throughout the year both inside the organization and to the public.
  - Organization has a documented volunteer recognition plan (could be included in org. communication or marketing plan).
  - Organization provides documents about recognition of a volunteer (copy of newsletters, annual reports, volunteer recognition awards banquet invitation, etc.).

**Technology and Communications** – Implement supportive technology, invite dialogue with volunteers, and articulate volunteer contributions and impact.

*Note: The utilization of current technology allows nonprofits to stay in continuous contact with volunteers through email distribution lists, social media and website updates regarding volunteer opportunities and upcoming events.*

- Organization leverages appropriate current technology to recruit, communicate with and manage volunteers and tracks statistics.
  - Organization may provide:
    - Social media links
    - Copy of electronic newsletter

- Website screenshot of volunteer opportunities (some of our orgs just include a link to their opportunities on the Volunteer Center’s website, they just have to keep them up to date in one spot)
- Documentation of tracking service hours for rewards and recognition
- Documentation of tracking birthdays and anniversaries for recognition
- Link to online volunteer application

**Partnering to Extend Reach** – Cultivate a mutually beneficial relationship with the community to increase engagement and reach.

- Organization invites stakeholder participation through a variety of community engagement programs, including but not limited to volunteer programs.
  - Barriers to community participation in decision-making are removed whenever possible.
  - Organization and its leaders are accessible and responsive to their community.
- Organization has established partnerships with community organizations to better leverage resources. For example, organization has a partnership with a business that provides a pipeline of skilled based volunteers to build capacity or Organization has a partnership with a local faith based group who provides space for volunteer trainings.
  - List of organizational volunteer partners (ex. businesses, service clubs etc.)
  - Sample MOU with a partner that outlines the partnership and its relationship to volunteer involvement
  - MOU or partner agreement with a volunteer center

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