



## **SAMPLE PLAN FOR VOLUNTEER PROGRAM ASSESSMENT**

### **TIMELINE OVERVIEW FOR ASSESSMENT**

Announce the Review: To be completed by XX/XX/XX

Review Existing Materials: To be completed by XX/XX/XX [Suggested timeframe: 2 – 4 weeks]

Gather Constituent/Stakeholder Feedback: To be completed by XX/XX/XX [Suggested timeframe: 2 – 3 months]

Analyze the Data: To be completed by XX/XX/XX [Suggested timeframe: 1 month]

Report Out the Data: To be completed by XX/XX/XX [Suggested timeframe: 2 – 4 weeks]

### **WHAT WILL BE REVIEWED IN THE PROCESS**

Potential program areas to review:

- Volunteer Program Planning, Design and Resources
- Staff Capacity, Engagement and Support
- Volunteer/Staff Relations
- Communication with Volunteers
- Recruitment
- Volunteer Assignments and Expectations
- Orientation and Training / Onboarding
- Recordkeeping and Reporting
- Support and Supervision of Volunteers
- Volunteer Recognition
- Evaluation Process of Program & Individuals

### **PLAN: CONDUCT ASSESSMENT & ANALYSIS OF CURRENT VOLUNTEER PROGRAMMING**

It is critical to understand where the volunteer programs and volunteer experience currently stand in order to make strategic and valuable change. An assessment of both is to be conducted with the ultimate goal of strengthening the way the Trail Conference engages with volunteers and supports its staff.

#### **Announce the Assessment**

***To be completed by XX/XX/XX***

- Let staff know an assessment of the volunteer program is going to take place. Announce via email to whole staff and staff meetings. Let them know this is an important tool to improve the organization and volunteer experience. Share the general plan and timeline with the staff.
- Let volunteers know an assessment of the program is going to take place and that they will have the opportunity to be part of the process. Announce via email and at appropriate volunteer meetings.



## **Review Existing Materials**

***To be completed by XX/XX/XX***

Potential documents to review:

### **Volunteer Program Documents**

- List of existing volunteer positions and list of current assignments
- Job descriptions for each position
- Volunteer recruitment process and documents
- Volunteer application form
- Current onboarding materials and process
- Training/workshop availability and structure
- Volunteer reporting process and documents
- Volunteer policies
- Volunteer handbook
- Volunteer recognition programs
- Prior volunteer satisfaction surveys

### **Organizational Documents**

- Workflow chart / Organizational chart
- Long-term strategic plan and budget
- Annual plan (goals, objectives, budget)
- Organizational branding and messaging
- Job descriptions of staff who interact with volunteers

### **Database/Website**

- Current website interface for volunteers
- Backend database(s) / CRM system

### **Hands-on Review**

- Attend existing volunteer workshops / meetings / events

## **Gather Constituent/Stakeholder Opinions & Feedback**

***To be completed by XX/XX/XX***

One-on-one stakeholder interviews with individuals who can provide insight. May include:

- Staff
- Board
- Volunteers: Leaders, veterans, and recently joined
- Park and land managers

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#### Focus group / working session

- Invite a large variety of volunteers that can represent the different programs, positions and experiences
- Divide attendees into teams of 3 to 4 people based on similar roles/experiences
- Conduct working session in which teams work together to fill out assessment score sheets
- Send a thank you note to attendees after the session

#### Create and distribute online survey for all volunteers

- Distribute a short survey to entire active volunteer base to assess what their experience is, and let them know we're working to improve the volunteer experience
- Send launch email on a Monday; Send one reminder on Thursday with a final deadline; Close the following Monday

#### Analyze the Data and Report it Out

***To be completed by XX/XX/XX***

#### Compile data and review internally

- Compile all the raw data into a digestible report/presentation
  - a. Qualitative from interviews
  - b. Focus group scores and qualitative notes
  - c. Survey results
- Conduct working session with management team. Sample questions to be discussed:
  - a. Overall, are we satisfied with the assessment scores?
  - b. Are any responses surprising? How?
  - c. What positive things were confirmed?
  - d. What should receive priority attention for improvement?

#### Create public report and share the assessment

- Create an easy-to-understand report
  - a. Results of the interviews, focus group session, and survey
  - b. Strengths, weaknesses, opportunities, threats
  - c. Next steps
- Share the report with staff, board, and volunteers via email and appropriate meetings
  - a. Include thank you with release of results