Why Encore Volunteers?
Encore volunteers are post-midlife or retired employees who seek ways of using their skills and experience to give back to society. Encore volunteers significantly enhance the mission and effectiveness of units through the services they provide to the unit and to the University, bringing experience and a variety of expertise to these roles. Encore volunteers can become ambassadors for your unit and for the University in the community.

In addition, they may bring special opportunities for intergenerational interaction. The University of Washington has the ability to attract Encore volunteers with unique skills and experience who have a particular aptitude or passion for the work of your unit. Encore volunteers often have strong commitment to the institution and want to actively support its mission. Encore volunteer programs can provide meaningful engagement for skilled individuals who have the time, interest and capability to complement the work of your unit’s employees.

Successful volunteer programs enjoy support throughout all levels of an organization, but to be successful they require dedicated unit resources for training, supervising and cultivating feedback from volunteers. The University of Washington encourages units to consider developing an Encore volunteer program to take advantage of the potential for Encore volunteers to significantly support University goals of research, education and service.

These guidelines are intended to help academic and administrative units develop successful and meaningful Encore volunteer programs. Potential Encore volunteers can share these guidelines in their discussions with units that are not be aware of them.

Deciding to Engage Encore Volunteers

A volunteer program should be based on the principal that volunteers can augment and enhance your programs activities and not supplant or substitute for the work that regular staff employees would do.

If you are thinking about developing an Encore volunteer program, consider the following questions:

- How do the talents and experience of Encore volunteers fit into our mission and goals?
- What roles do we want volunteers to fill?
- What skills and experience should volunteers have?
- Can volunteers help us relate to the clients we serve?
- Can we support Encore volunteers so they can contribute effectively to our mission?

For Unit and Volunteer Managers

Engaging talented Encore volunteers requires an investment in time to select, train, and supervise them. Units are responsible for developing volunteer job descriptions, recruiting and selecting volunteers with skills that match the unit’s needs, volunteer orientation, training, supervision, evaluation, and recognition.

If you plan to make extensive use of Encore volunteers, consider designating a volunteer coordinator for your unit. In smaller units the role of “volunteer coordinator” may not exist; instead, an individual who may have many other responsibilities is asked to manage the organization’s volunteers.

December 2015
Talk with your departmental Human Resources representative and/or Environmental Health & Safety about which policies relate to volunteers to understand your obligations before starting your volunteer program.

There are a number of UW campus units with excellent volunteer programs. These units have existing guidelines and policies that can be used in developing your own program. See Resources and Bibliography at the end of this document.

**Encore Volunteer Positions**

When you develop Encore volunteer opportunities it's important to be clear about your unit's needs and, for the sake of volunteer longevity, about how such roles utilize the talents of the volunteer to make a difference.

**Position Descriptions**

Develop detailed position descriptions for Encore volunteer opportunities that define the activities and responsibilities of each position and its minimum and preferred background or qualifications. As with paid positions, be specific about the projects, roles and skills needed.

Involve staff members when designing volunteer roles to help ensure that the work of the volunteer will fit well with the work of regular employees, and to ensure that boundaries between the work of staff and the work of volunteers are clear.

**Applications**

When filling an Encore volunteer position, create an application that, in addition to collecting basic contact and availability information, allows the applicant to address:

- The candidate’s interests and reasons for volunteering
- Special skills they bring to the position
- Availability and interest in ongoing service or preference for short-term or project-oriented work (You may be offering one or both)
- Physical ability to do the work described

Include with application any other forms needed depending on nature of volunteer roles.

**Interviews**

It’s important to interview volunteer candidates to identify the best available match for a position and to provide information about the position’s purpose, conditions and boundaries. If the role is time-limited or project-oriented, be clear about what the job or time limits are. Check references. If you need a specific minimum time commitment from the volunteer, be sure you make that clear, too.

**Consider a Volunteer Agreement for incoming volunteers**

A volunteer agreement is signed by the volunteer and by the supervisor on behalf of the unit or organization. It should state that the volunteer’s service is expected to be mutually beneficial to the volunteer and to the unit. If at any point either party finds that the relationship is no longer meeting their needs, the relationship can be ended by either party by providing verbal notice. Examples of volunteer agreements can be found under “Volunteer Service Agreements” in the Resources and Bibliography at the end of this document.

**Orientation and Training**

An Orientation introduces Encore volunteers to your organization and its mission, and should cover general expectations for volunteer performance and behavior.

*December 2015*
Training is task- and unit-specific and should be tailored to the requirements of each position. Volunteers will require initial training and volunteers in some positions may need ongoing in-service training. Developing a set of clear training materials or a handbook will get your volunteers off to a good start and also helps to maintain high-quality service.

Create an Encore Volunteer Handbook
If you plan to use Encore volunteers regularly, consider preparing an Encore volunteer handbook describe your organization's culture, policies and expectations, such as attendance, recommended dress and conduct while volunteering. Examples of handbooks can be found by checking the Resources and Bibliography at the end of these guidelines.

The handbook should include all policies relevant to volunteers and their roles. Other topics to consider include:

- The unit’s mission and where it fits within the University
- Position descriptions for volunteers
- Contact information for supervisors, including after-hours contact
- A statement of the University’s non-discriminatory policy and non-harassment policy
- Notification regarding background checks, if necessary
- Additional training that may be required
- Emergency procedures (and references to an emergency plan if you have one)

Supervision of Encore volunteers
Those people who routinely supervise volunteers should be offered professional development to help the volunteer program succeed. King County United Way offers a daylong workshop on volunteer coordination. This supervisory role should be included as part of their employment job description.

Supervisors should make sure that volunteers complete tasks correctly, that their questions are answered in a timely fashion, and that the unit is properly represented through the volunteer’s work and conduct.

When volunteers are not fulfilling their roles or are no longer needed
If you determine that a volunteer arrangement is not proving beneficial to your unit you may notify the volunteer that her/his services are no longer needed. Your signed Volunteer Agreement (see above) can be helpful. It should state that if at any point either party finds that the relationship is no longer meeting their needs, the relationship can be ended by providing verbal notice. If at any point you anticipate difficulty in ending the volunteer relationship, consult with your HR Representative to discuss your concerns.

Purposes for Recording and Reporting Encore Volunteer Service
The UW encourages departments to register all unit volunteers in their own records for the sake of Labor and Industries Industrial Insurance coverage through the UW, if needed (reference: RCW 51 Industrial Insurance: http://apps.leg.wa.gov/rcw/default.aspx?cite=51.12.035 A volunteer is defined as a person who performs duties without compensation for the state or a state agency “and is registered and accepted as a volunteer by the state or any agency thereof”). If your unit is an affiliated non-profit of the University, you should carry liability coverage through the non-profit organization. Your building coordinator and Emergency Preparedness Team will also want information on names and usual hours in office in case of an emergency.

Organizations that are affiliated with the University but have a separate nonprofit certification (e.g., the UW Alumni Association, the UW Retirement Association) should consider separate liability coverage for volunteers working for the nonprofit.

December 2015
Units are also encouraged to record volunteer names with hours of service. This information may be beneficial to you in tracking hours for individual recognition as well as cumulative hours for reporting on grants and for fundraising.

**Results and Recognition**

*Soliciting Feedback from Encore Volunteers*

An Encore volunteer’s time can be extremely valuable as an asset to your organization. Consider regularly assessing how the volunteer feels about his/her position, including at the completion of their service. Is the work meaningful? Is the work fun or worthwhile? What could be improved? What’s working well?

An exit interview at the conclusion of a volunteer’s service is a good time to assess the role for both the volunteer and the unit and consider adjusting the roles or adding fresh challenges. Is the role itself is complete? If so, mutual evaluation is important as a component. This is another way to tell them their input is valuable.

**Recognition**

It is an axiom of good management that “no one ever is thanked enough.” This is especially true for volunteers.

Formally recognizing the hard work of your unit’s Encore volunteers conveys your appreciation for their contributions. There are many ways to recognize volunteers; whatever you choose, that effort to thank them will be greatly appreciated.

**Measuring Impact**

Recording Encore volunteer hours of service is recommended to help you document volunteer contributions for grants, publicity, and volunteer recognition. Use an easy-to-understand time sheet and ask them to record their time. In addition to hours worked, keep records of what your volunteers have accomplished, and whether those achievements would have happened without them (and at what estimated cost to the organization).

Tracking and reporting to the volunteer both volunteer hours and a statement of the impact of their work are other ways of recognizing a volunteer’s contributions.

The UW Encore Initiative requests copies or a summary report of such records to help assess the initiatives effectiveness.

National research shows that the estimated value of volunteer time in 2011 was, on average, $21.79 per hour. Develop your own measures and criteria for judging the success of your volunteer program.

**Summary Checklist: Supervisor Guidelines for Effective Use of Encore Volunteers**

Remember that supervision is about building and maintaining relationships. Those relationships should be characterized by mutual trust, respect and recognition of competency and professionalism.

- Recruit, screen, interview and check references
- Orient volunteers to your unit, its mission and its culture
- Train volunteers in
  - Applicable UW policies and procedures
  - Use of office and specialized equipment as necessary
- Work with staff to provide accurate information and assistance to volunteers

*December 2015*
• Monitor volunteers’ adherence to your unit’s expectations for the service they will provide
• Ask for feedback from volunteers about their ideas for improving their project or efforts
• Inquire about volunteer satisfaction
• Survey staff to assess needs for volunteer assistance
• Maintain records on volunteer participation
• Confer with volunteers to resolve issues and promote workplace harmony
• Recognize volunteer accomplishments and thank volunteers at every opportunity

Legal/other considerations

Labor and Industries

Injuries in the Workplace: Volunteers' medical costs are covered if they are injured while performing assigned duties for the University unit.

Liability

See Purposes for Recording and Reporting Encore Volunteer Service, above.
Resources and Bibliography

An excellent local resource for information and guidance on managing volunteers is at 501 Commons (http://www.501commons.org/resources/tools-and-best-practices/volunteer-management). The website contains a number of articles on best practices as well as references with detailed information about related subjects. The organization of these guidelines, and some of the information, was drawn from their website.

The Nonprofit Times (http://www.thenonprofittimes.com/author/nonptadmin/) has a number of articles on its website, many drawn from other sources. The articles include such topics as: 5 Questions to Ask Volunteers, Volunteer Management, Volunteers as Organizational Assets and 9 Ways to Involve Volunteers.

Idealist (http://www.idealist.org) contains many resources, including its own bibliography of best practices (http://www.idealist.org/info/VolunteerMgmt/Best). Energize, a similar site, has information on ways to measure the impact of volunteers (https://www.energizeinc.com/how_tos_volunteer_management/program_assessment).

A number of UW units have produced excellent material for volunteer management:

The School of Medicine has created policies for laboratory volunteers (http://www.gs.washington.edu/office/operations/hr/volunteers/som.htm).

UW Medicine devotes a section of its website to volunteer services (http://www.uwmedicine.org/uw-medical-center/volunteer). It also has a newsletter for volunteers.

The College of the Environment has many volunteer programs has put its policies and procedures (http://coenv.washington.edu/intranet/personnel/staff-hiring-and-development/volunteer-workers-policy-and-procedures/) online.

UW Botanic Gardens has a large volunteer program (http://depts.washington.edu/uwbg/support/volunteer.php) and produces a volunteer handbook.

The Henry Art Gallery has an online application (http://depts.washington.edu/uwbg/docs/VolunteerHandbook2013.pdf) for volunteers.

Volunteer Service Agreements

Neurosurgery, UWMC: http://neurosurgery.washington.edu/attachments/service.pdf

UW Biology: www.biology.washington.edu/pdf/forms/BiologyVolunteerForm.doc