



## Volunteer Capacity Assessment

**Assessment Period:**

- Baseline/Pre
- Mid
- Final/Post

**Partner Site:****Supervising Organization:****Date:**

**Year in Program:**      **Year 1**      **Year 2**      **Year 3**

**Assessment completed by:**

*This tool measures the level of volunteer program infrastructure present at a service organization.*

**INSTRUCTIONS:**

Mark “Yes” for indicators that have been completed/are in place at the organization. Mark “No” for indicators that are not in place at the organization. Mark “Somewhat” for indicators that are in the process of being completed or put in place at the organization.

Please mark only one answer per question in the column that corresponds with the assessment period in your program year (baseline, mid, or post).

Please email all completed assessments to your Supervising Organization.

# 1

## Volunteer Plan Development

Reflects volunteer utilization, addresses values for volunteer involvement and addresses the need for procedures for managing volunteers. This standard is typically indicative of the first program year.

Indicator	Achieved (Yes/Somewhat//No)		
	Baseline	Mid	Final
1a Benefits and challenges related to volunteer involvement inside the organization have been identified.			
1b Organizational leadership has defined volunteer engagement as a priority.			
1c There is a plan in place to dedicate appropriate resources (e.g., financial, space, training, supervision, etc.) to the organization's volunteer program.			
1d A recruitment plan for volunteers has been created, including marketing to community organizations (e.g., outside organizations, businesses, service clubs) and diverse populations.			
1e Potential community partnerships for recruitment have been identified (e.g., outside organizations, businesses, service clubs).			
1f Human resources and risk management policies that relate specifically to volunteers have been developed.			
1g A volunteer waiver form that addresses potential risks is signed by all volunteers.			
1h Needs for volunteer roles throughout the organization have been identified, including opportunities for skilled volunteers or volunteer leaders.			
1i Volunteer position descriptions that include performance goals or expectations have been developed.			
1j A volunteer application form and application process is in place (e.g., system for distributing, collecting, and reviewing applications and conducting interviews as appropriate).			
1k An interviewing and screening process, including appropriate criminal and/or motor vehicle background checks when applicable, has been developed and implemented.			
1l Volunteer orientation trainings and materials have been created and implemented (e.g., handbook, emergency procedures plan, etc.)			
1m A supervisor has been identified for every volunteer role.			
1n A volunteer retention and recognition plan that includes formal (e.g., celebration, gifts) and informal (e.g., organizational culture of appreciation) recognition has been developed.			
1o A system to receive volunteer feedback has been developed.			
1p Volunteer tracking mechanisms (e.g., tracking of volunteer hours, tasks accomplished, etc.) are in place.			

# 2 Volunteer Plan Implementation

Staff is comfortable and confident at supervising and utilizing volunteers effectively. This standard is typically indicative of the second program year.

	Indicator	Achieved (Yes/Somewhat//No)		
		Baseline	Mid	Final
2a	A purpose statement has been developed for the organization's volunteer program.			
2b	Resources (financial, space, training, supervision, etc.) have been allocated for a volunteer management program.			
2c	A plan has been created to incorporate community organizations (e.g., outside organizations, businesses, service clubs) in regular volunteer activities.			
2d	Strategies to develop potential partnerships with community organizations (e.g., outside organizations, businesses, service clubs) have been identified.			
2e	A volunteer recruitment plan has been implemented.			
2f	All volunteers and staff have been trained in appropriate human resources and risk management policies that relate specifically to volunteers.			
2g	Diverse volunteer roles that include a wide range of abilities, ages, and interests have been established.			
2h	Volunteer roles have been documented and communicated to appropriate staff.			
2i	A system to provide feedback and evaluation on the work of individual volunteers has been developed.			
2j	A responsive communications process is in place so volunteers are contacted within a reasonable time after they apply.			
2k	An ongoing volunteer training plan and materials have been developed.			
2l	Volunteer supervision responsibilities are included in staff and higher-level volunteer position descriptions (e.g., providing support, opportunities for communication, accountability).			
2m	Strategies (e.g., events) are in place to build relationships between staff and volunteers.			
2n	A system is implemented for volunteers to receive formal (e.g., celebration, gifts) and informal (e.g., organizational culture of appreciation) recognition of their contributions.			
2o	A system to receive volunteer feedback has been implemented.			
2p	Volunteer tracking mechanisms are maintained and checked for accuracy on a regular basis.			

## 3

**Volunteer Plan Sustainability**

Organization utilizes volunteers alongside staff to achieve its mission and has a plan to sustain the volunteer program. This standard is typically indicative of the third program year.

	Indicator	Achieved (Yes/Somewhat//No)		
		Baseline	Mid	Final
3a	A plan for integrating volunteers into the organizational structure at multiple levels has been developed.			
3b	The organization's annual budget reflects detailed expenses for volunteers (e.g., staff time, recruitment, training, supplies, space, recognition, etc.)			
3c	At least two community organizations (e.g., outside organizations, businesses, service clubs) have been approached in efforts to build partnerships for volunteer roles in the organization.			
3d	Recruitment efforts are regularly evaluated for their effectiveness and adjustments are made to strategies accordingly.			
3e	The organization has a plan to ensure that volunteers represent the diversity within the community, including a system for recruiting and meeting needs of diverse groups.			
3f	Volunteer supervisors are held accountable for ensuring that their volunteers are complying with applicable human resources and risk management policies.			
3g	The organization conducts an annual review and update of all volunteer position descriptions.			
3h	A system to provide feedback and evaluation on the work of individual volunteers has been implemented.			
3i	Volunteers are matched with appropriate positions based on their abilities, interests, and level of commitment.			
3j	Ongoing training plan and materials have been implemented.			
3k	Staff and volunteer leaders are trained in volunteer management best practices that include varied approaches appropriate for diverse individuals and groups.			
3l	Conflicts between staff and volunteers have been anticipated and addressed by organization administration.			
3m	The organization's volunteer retention rate (e.g., number of volunteers that completed their original commitment to the organization) is tracked, recorded, and analyzed.			
3n	There is a process in place to analyze volunteer feedback and to make adjustments to the program.			
3o	An evaluation plan has been developed to utilize the data obtained using the volunteer tracking mechanisms.			