**2019-2020 Volunteer Engagement Strategic Plan**

*One Goal: Become the premier Volunteer Engagement Department in San Diego County*

**Purpose of Strategic Plan:** The intent of this document is to provide framework for the Volunteer Engagement restructure. Each section will outline the proposal, strategy, target date and personnel impacted by the update. The goal is to use this document as a guideline to streamline processes, organize the department and prepare strategy to become the premier Volunteer Engagement Department in San Diego County within the 2019/2020 fiscal year.

**Structure of Strategic Plan:** Each section represents a facet of the Volunteer Engagement Department, including the volunteer intake process, outreach and recruitment strategy, partnerships, training, appreciation techniques, and staff restructure. Below are the designated sections within the strategic plan which will be addressed within the 2019/2020 fiscal year. By the end of the fiscal year, Volunteer Engagement will provide a comprehensive Volunteer Engagement SOP (goal: June 30, 2020).

**Timeline:** With each highlighted area to address, Volunteer Engagement’s plan is to enhance our retention efforts, volunteer training plan, partnership outreach and recruitment strategy in order to become the premier Volunteer Engagement Department in San Diego County. You will note that each section will provide an outline for next steps and deadlines to ensure we keep ourselves accountable.

**Review Process:** Once the Strategic Plan is finalized, the Director of Volunteer Engagement will present to the Volunteer Engagement Department, VP of People & Culture and COO. The Volunteer Engagement Coordinator, Lead Volunteer Coordinator and Volunteer Coordinator will be included throughout the planning process; moreover, the Volunteer Engagement team was previously asked to provide responses to the following questions to help outline our goals moving forward:

1. How would you improve the volunteer intake process?
2. What areas, processes and procedures need improvement within Volunteer Engagement?
3. What are your goals for the department?
4. What would you like to focus on within Volunteer Engagement?
5. What do you think of the Volunteer of the Month program?
6. What do you think of hosting an in-person orientation? If you disagree, please tell me why an in-person is more effective than the online orientation.
7. What do you think about providing a “donuts & discussion” opportunity for volunteers? If you are keen on this idea, do you have a vision in mind?
8. Any other ideas you would like to see implemented? The world’s our oyster!

**Volunteer Engagement One-Goal:** The overarching goal for Volunteer Engagement is to serve as the premier volunteer engagement department in San Diego County, meaning that our program serves as a model for volunteer engagement, management and retention for our partners and other non-profits in the community. How do we get there? By working towards increasing volunteer engagement *– recruitment, outreach, onboarding, training, retention –* by 10% in the 2019/2020 fiscal year.

**Evaluation:** How will we know if we reach our One-Goal? This is an area that we will work in tandem with Community Impacts and Marketing, focusing on the following:

1. Review the current measurements to create a baseline, including the number of potential volunteers, volunteers who are placed, volunteers who commit volunteer service on an annual basis, and volunteer satisfaction in their role. Volunteer Engagement will generate a satisfaction survey amongst the current volunteer population, working with Community Impact to ensure we are not asking vanity but rather reflection questions. Moreover, Volunteer Engagement will host a Jewish Family Service Volunteer Town Hall and/or forum, inviting volunteers to share their experience and suggestions for improvement. Ideally, we would like to host this event mid to late July 2018 to ensure our updates and goals are on track.
2. Host focus groups with volunteers throughout the fiscal year to (1) capture their story, (2) learn about the impact of volunteerism – not just volunteerism in terms of Jewish Family Service but in general, and (3) ensure we are being responsive to the volunteer needs.
3. Create and share the volunteer story, working (as aforementioned) with Community Impact, Marketing and Outreach.
4. Determine the barometer for volunteer engagement (e.g., number of volunteer placements, increase of volunteer hours, additional leadership positions, participation in volunteer events, positive responses to survey questions) and establish a measurement tool to capture such.
5. Based on the aforementioned results, address areas of improvement and continually be responsive to the needs of the volunteers, internal staff and partners.

**Volunteer Engagement Infrastructure:** The next section addresses how to streamline the volunteer onboarding process, including the volunteer application, orientation, intake steps and placement.

**First Step: Complete Volunteer Application**Currently, the Volunteer Engagement Department houses three applications: general, one-time and high need, which has provided confusion. So, here’s the plan for the Volunteer Application (Deadline: November 1, 2018):

1. Consolidate all three applications, creating only one volunteer application. The fields addressed on the one-time and high need applications can be adapted to fit into a general volunteer application.
2. Add phone screening questions to the application to (1) eliminate process within the intake process and (2) provide basic background information within the first step of the volunteer intake process.
3. Remove volunteer references from application but indicate that this may be requested depending on the volunteer position (e.g., Jewish Big Pals).
4. Work with Marketing to address the new website format and inability for the application to feed into our current database, Volgistics\*. Below are additional steps:
   1. Determine the roll-out date for the new JFS website
   2. Review options for an online application
   3. Discuss the impact of a potential new database/CRM in terms of the online application
5. Review the questions and fields on the application to determine if the information is necessary (e.g., references) and/or if there’s missing data the agency would like to collect, like ethnicity.
6. Ensure the intake process is clearly outlined within the new copy of the website.

\*Update: VE will be onboarding a new CRM (Galaxy Digital). The data will be transferred and the database (and volunteer portal) will be live by December. The application will be informed by this new database.

**Second Step: Host Volunteer Orientation**At this juncture, Volunteer Engagement is solely hosting an online volunteer orientation. Once an application is submitted, the potential volunteer receives the following prompted message, indicating to visit the JFS website to review the online Volunteer Orientation.

*Dear volunteer applicant,*

*Thank you for your interest in volunteering with Jewish Family Service of San Diego. We require that all volunteers go through a brief online-orientation before their phone screening. This involves reading through our Volunteer Orientation webpage, which offers a holistic picture of Jewish Family Service. To begin, please visit* [*http://www.jfssd.org/orientation*](http://www.jfssd.org/orientation)

*A member of the Volunteer Engagement Team will be contacting you shortly to discuss the next steps in the volunteer application process. The decision to accept an applicant into a program will be based upon a final assessment done by the program staff at the completion of the application process.*

*If you have any questions, please contact us at (858) 637-3000. Thank you for choosing Jewish Family Service of San Diego!*

*Volunteer Engagement Team*

Here are the steps we would like to take to enhance this process:

1. We would like to modify this message to be more personable and informative, indicating that the next steps are to sign-up for an in-person Volunteer Orientation. Currently, we will update on the back-end of Volgistics (our database/CRM). Deadline: July 23, 2018.
2. Starting in August, the Volunteer Engagement Department will host in-person Volunteer Orientations. The goal will be to schedule biweekly, providing 2-3 orientations a month. Deadline: August 1, 2018.
3. In mid-July, the Volunteer Engagement Coordinator, Volunteer Engagement Manager and Volunteer Engagement Director will create the Volunteer Orientation program delivery, which will be an hour to 1.5 hours and will include the following components (Deadline: July 23, 2018):
   1. History of Jewish Family Service (JFS)
   2. Overview of the Programs/Services
   3. Review of the Volunteer Journey within JFS
   4. Highlight of the current volunteer needs: invite program staff to address high need volunteer positions
   5. Next steps: sign up for an interview with Volunteer Engagement!
4. Create, recruit and train volunteers to facilitate orientations to (1) maximize Volunteer Engagement time and efforts and (2) demonstrate and model how to utilize volunteers in all capacities. Deadline: July 23, 2018.

**Third Step: Conduct Interview**Currently, Volunteer Engagement hosts a phone interview after an application is received in addition to an in-person interview with the program staff. This appears to be redundant. To streamline, Volunteer Engagement will host an in-person interview with the program staff, if applicable. Here’s the process to streamline (Deadline: October 31, 2018):

1. Review current phone and in-person screening questions and adapt into a general interview questionnaire. Moreover, work with HR to add more personality and behavioral questions to ensure we are getting to know the candidate on a deeper level.
2. Work with program staff to update specific programmatic questions and add as addendum to the general interview questionnaire to (1) avoid surplus of documents and confusion, and (2) keep the process streamlined and organized.
3. Create a schedule and sign-up process for potential volunteers to register at the in-person orientation.
4. Ensure all Volunteer Engagement staff is on deck for in-person interviews, either designating by day of the week or programmatic focus. This process still needs to be fleshed out.

**Fourth Step: Paperwork**During the in-person interview, the Volunteer Engagement staff will provide the applicable next steps, which may include:

1. Livescan/background check
2. DMV Pull
3. Youth Permission Form
4. Release of Liability Form
5. Dress Code
6. Client as a Volunteer
7. Parking
8. HIPAA

The Volunteer Engagement staff will ensure the paperwork is reviewed carefully with the potential volunteer and will be responsible for follow-up of the aforementioned procedures. Once the documents are received, Volunteer Engagement will upload onto the volunteer’s profile within Volgistics. If this isn’t an option based on our current plan with Volgistics, Volunteer Engagement will continue to upload to the V-drive.

**Fifth Step: Placement**Once a volunteer has completed the application, attended an orientation, conducted the interview, signed the paperwork and identified a position, he/she is ready to be placed. Volunteer Engagement will work with the program staff to ensure the volunteer has been provided the following, if applicable:

1. Badge & Volunteers are the Heart of JFS lanyard
2. Building access
3. Email address
4. ETOi access
5. Station/computer

The Volunteer Engagement Department will work closely with the program/program staff to submit an intake form, if necessary.

**Sixth Step: Training**There are three types of training involved: (1) for the volunteers, (2) for the Jewish Family Service staff and (3) for outside partners. Below highlights the trainings Volunteer Engagement will facilitate:

1. Introduction to Volunteer Engagement at all New Hire Orientations: starting July 2018, Volunteer Engagement will provide a 15-minute overview of the Volunteer Engagement Department, showcasing the following (Deadline: July 2, 2018):
   1. Volunteer video
   2. Volunteer impact within JFS and community
   3. Quick overview of the volunteer intake-process
   4. How to request a volunteer
   5. Highlight of available trainings
2. Volunteer Management 101/102: starting summer 2019, the Volunteer Engagement Department will provide Volunteer Management 101 and 102 training modules for partner sites. JFS will pitch with Hands On Network and Non-profit Management to offer training for their clientele. Deadline: June 30, 2019.
3. Volunteer Engagement Modules: The Volunteer Engagement Department will provide a volunteer engagement training for all staff to showcase the following (Deadline: June 30, 2019):
   1. How to request a volunteer for your department
   2. How to manage a volunteer
   3. How to appreciation and retain your volunteer (Deadline: June 30, 2019)
4. Additionally, each program staff and department have an imbedded training provided for volunteers. Volunteer Engagement will work with each program staff to ensure there’s uniformity and consistency. Deadline: June 30, 2019.

**Volunteer Recruitment & Outreach:** This section will address the strategy to recruit volunteers

1. **Postings:** At the end of July, the Volunteer Engagement Coordinator will schedule and host the bi-annual program check-in to provide an update of the Volunteer Engagement structure and intake processes, review the current postings/volunteer positions and discuss department needs. This is an opportunity for Volunteer Engagement to do a “reset” with each program, ensuring the postings are updated and the program needs are addressed. In this vein, the Volunteer Engagement Administrative Assistant will work with the team and program staff to update the postings. Additionally, the Volunteer Engagement Department will:
   1. Review all current postings. Deadline: November 30, 2018.
   2. Recruit a Volunteer Posting Editor to streamline all postings to ensure the font, font size, diction and layout are uniform. At this juncture, we would like to add some culture speak into our posting language (e.g., Want to be a superhero?). Deadline: August 15, 2018.
   3. Work with Marketing and Outreach to host a monthly recruitment theme, like June focuses on Immigration as it’s national Immigration Heritage Month. Deadline: January 1, 2019.
2. **Presentations:** The Volunteer Engagement Department will work with both Marketing and Outreach to research potential companies, organizations, clubs and groups to schedule a presentation about volunteerism and JFS. The goal is to host at least x1 presentation a month. Deadline: June 30, 2019.
3. **Internal Recruitment:** Most successful recruitment efforts come from your internal staff; so, in this vein we plan to host two types of recruitment/retention strategies:
   1. **A three-month recruitment strategy:** Starting April 2019, Volunteer Engagement will work with Marketing, HR and program staff to invite current volunteers to participate in a three-month recruitment effort, inviting volunteers to bring a friend, family member or neighbor to an orientation or Open House. The Volunteer Engagement Department will incentivize by soliciting donations for opportunity drawing prizes, adding any current volunteer to the drawing who has done the aforementioned: brought a friend to JFS! The goal would be to increase our volunteer recruitment numbers by 10%. Currently, we are onboarding an average of 20-25 volunteers a month. We would like to increase that number by at least 10%.
   2. **A monthly Donuts & Discussion:** Starting in the fall 2018, Volunteer Engagement will host a monthly Donuts & Discussion on campus for current volunteers to meet, discuss JFS happenings and highlight a particular program/subject. There will be donuts, discussion and a special guest each month. This will be advertised by Volgistics (database/CRM), programs and the enewsletter (scheduled to restart in September 2018).
4. **Technology:** Working with Gimbal (Mobile Majority), Volunteer Engagement will solicit an in-kind advertisement that is centered on beacon (or GPS/situational) technology. Gimbal will provide up to six mobile advertisements that equates up to a $10,000 in-kind donation\*. We have used this service at both Kids for Peace and Words Alive. Deadline: January 2019.

*\*exploring a paid campaign to gain more traction for Rides & Smiles and general JFS volunteerism*

1. **Open House:** On June 24, 2018, Volunteer Engagement hosted an Open House which included a self-guided tour and journey of JFS, our programs and volunteer opportunities. The event was successful in terms of drumming up new volunteer support and engagement. We plan to host annually. Deadline: June 2019.

**Partnerships:** This section will review the Volunteer Engagement Department’s efforts to create partnerships in the community for volunteer management, recruitment, retention and outreach. Below are the areas we will explore in tandem with Outreach (Deadline: June 30, 2019):

1. **Nonprofit partners**
2. **Academic**
3. **Military**
4. **Jewish Connections**
5. **Corporations**

**Volunteer Appreciation & Retention:** This section will review the strategy to recognize and retain our volunteers in a meaningful, impactful and consistent manner.

1. **Implement Volunteer of the Month:** As a means to recognize volunteers each month, Volunteer Engagement will implement a Volunteer of the Month process. Deadline: November 1, 2018.
   1. Volunteer Engagement will create a process, including a one-page SOP, survey (<https://www.surveymonkey.com/r/G3YHPLZ>) and selection process.
   2. Volunteer Engagement will circulate the process at the start of each month.
   3. Fellow volunteers and paid staff have an opportunity to nominate a volunteer and submit to Volunteer Engagement by the 15th of each month.
   4. Volunteer Engagement will make their selection by the 25th of each month, announcing the next month’s volunteer via Marketing, the website and social media.
   5. The Volunteer of the Month will be invited to a quarterly lunch with the CEO and chiefs.
2. Formalize the Jack and Loraine Stern Award selection process. Deadline: February 1, 2019.
3. Add additional formal awards for the Annual Awards Luncheon. Deadline: February 1, 2019.
4. Promote volunteerism strategically on social media, highlighting the awards (as aforementioned) and Volunteer Appreciation month and week. Deadline: November 30, 2018.

**Needed Policies & Procedures:** This section highlights the needed policies to address risk management. It’s currently in draft form.

1. Create a Youth Permission Form
2. Create an Internship SOP, including:
   1. JFS Volunteer Orientation
   2. Parking Policy
   3. HIPAA
   4. ETOi
   5. Dress Code
3. Establish a formalized Livescan process, including:
   1. VE/HR shared roles
   2. Cost
   3. Savings
   4. Outside partners

**Other Areas for Improvement:** This final section quickly reviews other areas of focus, such as:

1. Research and implement a new database or CRM. Deadline: October 1, 2018.
2. Consolidate files on service and drives. Deadline: June 30, 2019

**Recruitment: OTG**

See attachment

**AmeriCorps:** Kim to update w/ her tasks/goals for 18/19 FY