

## **Guide to Informational Meetings with Sites, Departments or Supervisors Requesting Volunteer Assistance**

Successful volunteer placement depends upon accurate fact gathering to understand an organization, site, department or function that is requesting volunteer help. This understanding is critical to matching a volunteer with an organization based on skills and need for those skills. Follow the “Who, What, When and Why” process to effect a successful and sustaining match.

**Initial Meeting:** Set up a personal informational meeting with the site, department or program manager. If possible, the individual that will directly supervise the volunteer should also be present. Meet face to face to enable natural conversation and “intuitive” reading of responses and body language. Create an inviting atmosphere in order to make a solid connection and set a meeting time and place that is convenient for the manager.

**Who are you?:** Begin with a conversational tone to discover the site, program, or department’s mission or purpose, its history of volunteer support, and the types of service that volunteers will be asked to perform.

- Be on time and give your complete attention to the interview. Listen first, ask questions later.
- Be honest, direct and concise. Ask permission to take written notes.
- Who supervises volunteers (or who will supervise this volunteer)? Is it a staff member or another volunteer? Inquire about their role, availability and history of supervision.

**What:** Ask leading questions, requiring more than a “yes” or “no”, about the organization’s needs and the opportunities for volunteer support.

- What services does the site/department/program provide, what types of volunteer opportunities exist, and what is the general attitude toward volunteers?
- What is the process to volunteer: e.g. CORI/SORI, orientation, license, resume, training, position shadowing, time commitment, or other requirements.
- What type of volunteer would you see as “fitting” your organization?
- Take note of discrepancies between responses given by the department/program/site manager and the person that will provide direct supervision; and ask clarifying questions.

**Why:** Discuss the role and history of volunteer services in the organization.

- Why did volunteers begin to fill service needs, and how has it worked out?
- Why are you interested in finding volunteer help, and how have volunteers helped in the past?

**When Placed:** Get complete information on the position’s limitations and preferences

- Days and times volunteers are needed, transportation, and travel considerations.
- Will volunteers need to stand, sit, walk or lift and does the position require general skills such as computer and phone skills?
- Services will be provided to: students, seniors, males, females, ages, special needs?
- Is this for a group or one-on-one?
- Who will supervise the volunteer(s)?

**Where:**

- Where would the volunteer report and where does the volunteer position take place?
- Once on site, how are volunteer hours reported, how do they handle absences or rescheduling, and how are volunteers supported during their service?

**Recap: Briefly go over the highlights of the site, department or program’s needs, volunteer management structure, process and limits. Ask if the recap is accurate.** Give a timeline and the process for connecting potential volunteers who match the organization’s needs. Confirm the information for the site, department or program manager and provide your contact information, brochures, forms and other important supports to solidify the professional relationship.