

NATIONAL ALLIANCE ON MENTAL ILLNESS

VOLUNTEER HANDBOOK





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INTRODUCTION

This Volunteer Handbook Guide was developed to help NAMI Ohio Affiliate leaders establish processes within their organization to assist in orienting, onboarding, and managing volunteers with a list of valuable resources and best practices for new and established affiliates.

Please note that each affiliate should consult with their board members when completing an affiliate specific volunteer guide. Some board members function as volunteers so as you create your own guide and policies, you may want to include board member specific guidelines in different sections.

Additionally, internships often incorporate guidelines and policies attributed to the specific university or college associated with the intern. Please consult with the college or university with their specific guidelines when onboarding your intern.

The following volunteer handbook includes the following information:

1. Policies & Standards of Excellence
2. NAMI Programming
3. Affiliate Expectations
4. Volunteer Expectations
5. Volunteer Classifications
6. Volunteer Recruitment
7. Volunteer Onboarding
8. Maintaining Volunteers
9. Tracking Volunteer Data

Resources, attachments, and recognitions are presented in hyperlink format throughout this handbook. Affiliates are encouraged to adapt the samples to fit their accountabilities and preferences. Affiliate board approval may be required before applying specific expectations, policies, and standards.

1. POLICIES & STANDARDS OF EXCELLENCE

The **NAMI Standards of Excellence** are crafted “mutually agreed upon standards of operation” comprised from NAMI leaders and members. These standards were compiled as part of NAMI’s strategic planning-to-plan phase in 2006 when members identified standards as critical to NAMI’s growth and future success. NAMI’s Standards of Excellence are the fruits of that grassroots vision and subsequent labor. Affiliates can find the entire 25 page guide online [Here](#).

Upon introducing a general overview of NAMI policies and Standards of Excellence, affiliates are encouraged to share the NAMI mission, vision and values with their employees and volunteers alike.

- **Mission:** NAMI provides advocacy, education, support, and public awareness so that all individuals and families affected by mental illness can build better lives.
- **Vision:** NAMI envisions a world where all people affected by mental illness live healthy, fulfilling lives supported by a community that cares.

Values

- **Hope:** We believe in the possibility of recovery, wellness, and the potential in all of us.
- **Inclusion:** We embrace diverse backgrounds, cultures, and perspectives.
- **Empowerment:** We promote confidence, self-efficacy, and service to our mission.
- **Compassion:** We practice respect, kindness, and empathy.
- **Fairness:** We fight for equity and justice.

The below table outlines **NAMI policies** along with an overview explaining why it is important to include the policy for volunteers, what it means for the volunteer, and policy suggestions to consider.

Policy	Overview/Purpose	Other Considerations
Ethics	To provide all volunteers/interns of your NAMI affiliate, a policy or code of ethics of expectations to uphold the highest standards of respectable, professional behavior.	Violations of this policy refer to the disciplinary policy.
Confidentiality	Confidentiality is a hallmark of professionalism for your NAMI affiliate volunteers/interns. The purpose is to ensure that all information that is confidential or privileged or that is not publicly available is not disclosed inappropriately. It is also to ensure that all nonpublic information about other persons or organizations acquired by your NAMI affiliate personnel in dealing with outside organizations on behalf of your NAMI affiliate is treated as confidential and not disclosed.	<p>Exceptions to confidentiality as it pertains to the programs you have.</p> <ul style="list-style-type: none"> o I.e.- a person disclosed they were having thoughts of harming themselves or others. <p>Include reference to individuals that you may employ that are considered mandated reporters.</p> <p>Include reference to programs that may require mandated reporting that your affiliate has.</p>
Harassment	It is the policy of your NAMI affiliate to address and prevent antagonistic situations that violate the dignity of volunteers/interns and to promote and maintain a productive work environment. Your NAMI affiliate will not tolerate intimidation, humiliation, degradation, bullying, or other undesirable verbal, non-verbal, or physical conduct (single or repeated incidents) by any person towards another person or group of people that harasses, disrupts, or interferes with another's work performance or that creates an intimidating, offensive, or hostile environment.	<p>Reporting violations of this policy could be followed according to the grievance policy.</p> <p>Violations of this policy could result in actions according to the disciplinary policy.</p> <p>Provide examples of what possible harassment scenarios can occur.</p>
Diversity, Equity, and Inclusion (DEI)	To assure that your NAMI affiliate actively strives to be inclusive of every sector of their demographics and includes initiatives that promote the equal access, opportunity, and sense of belonging of underrepresented people in the workplace. Your NAMI affiliate believes strongly in treating all people with respect and dignity while promoting an inclusive workplace culture and	<p>Explicitly stating in the policy about a person's lived experience and how that may be reflected in some positions (paid or volunteer)</p> <ul style="list-style-type: none"> • I.e.- recruiting a person to oversee parent and caregiver programming and they must have lived experience in raising a child with a mental health condition.

	ensuring an effective recruiting and hiring process. The purpose is to strive to create and foster a supportive and understanding environment while carrying out the mission of the organization.	
Equal Employment Opportunity (EEO)	To assure that your NAMI affiliate has clear guidelines on following equal opportunity to all volunteers/interns who express an interest in volunteering. Your NAMI affiliate is to be seen as an equal opportunity organization irrespective of ethnicity, cultural or religious background, disability, age, gender, or sexuality.	Any inconsistencies that arise should be handled with the concern/grievance procedure. <ul style="list-style-type: none"> May want to include that you do not discriminate based on prior legal charges or obligations. (Refer to NAMI Education Program Operating Policies and Procedures)
Concerns/Grievances	To have clear guidelines on how your NAMI affiliate will address any concerns, complaints or grievances that may arise during their time as a volunteer. Your NAMI affiliate pledges to give both parties an opportunity to share their perspective.	It should specify who they can go to (more than one person in case of a conflict of interest or urgency), how to communicate (phone call/email/in-person) and specify appropriate boundaries. Your NAMI affiliate will respond to the person bringing the grievance within 3 business days and take appropriate action within 5 business days. Include different outcomes based on the nature of the concern/grievance.
Social Media	To ensure that such a powerful medium is not used inadvertently to undermine some of the guiding principles of NAMI. Volunteers/interns have the right to have their own political and religious views. However, if they talk about being a Program Leader/ Volunteer/Intern at NAMI, they are expected to use social media responsibly.	They are advised to put a disclaimer on their profile that their views are theirs alone and do not reflect the views of NAMI. Volunteers/interns also must behave in an appropriate and professional manner so they are advised that while a volunteer/intern with NAMI they cannot post any sexually inappropriate, hateful, racist, homophobic, disparaging, embarrassing or defamatory messages about other volunteers, interns, staff, or the organization on social media platforms. <ul style="list-style-type: none"> The volunteer/intern may be required to remove, revise or correct content that is in violation of this policy. Failure to do so or violating the policy may be the cause for terminating a volunteer/intern's services or taking disciplinary action in

		<p>accordance with the law applicable.</p> <ul style="list-style-type: none"> • Your NAMI affiliate may want to include a photo policy. • If you use volunteers/interns for a specific role (ex. Marketing) their social media activity on behalf of your NAMI affiliate must be pre-approved by that volunteer/intern's supervisor.
Drugs/Smoking/Weapons	<p>To make sure that while representing NAMI, volunteers/interns are conducting themselves in a safe manner. Volunteers may not represent NAMI under the influence of illicit drugs, alcohol, or while abusing prescription and over-the-counter drugs. Furthermore, outside of NAMI hours, the possession, use or sale of illegal drugs is never acceptable. Smoking is to be kept only to the areas where it is allowed. Volunteers cannot bring weapons to any place where they are representing NAMI even if it is a legal weapon and they have a conceal and carry permit.</p>	<p>We recognize that substance use disorders can be successfully treated. Seeking help or assistance is not considered grounds for discipline, but refusal to get help in certain circumstances can be a cause for suspension or removal.</p> <ul style="list-style-type: none"> • Your NAMI affiliate may want to consider separating this policy into specific Drug, Smoking, and Weapon policies. • Include restrictions and considerations for those who have legal prescriptions (i.e., medical marijuana) • May want to include a statement on search and seizure of your NAMI affiliate's property
Conflict of Interest	<p>To provide a procedure to preclude conflict of interest problems for your NAMI affiliate. To abstain from any vote in which they have conflict of interest.</p>	<p>Volunteers are prohibited from entering contracts to be paid for providing services for your NAMI affiliate.</p>
Safety Protocols	<p>Your NAMI affiliate is committed to creating and maintaining a safe and positive environment for volunteers and interns. Volunteers and interns are expected to follow facility safety plans and program safety protocols, including instructions issued by staff, building management, or public emergency services concerning fire drills and other practices.</p>	<p>Unsafe conditions that you cannot remedy should be immediately reported to your program coordinator. When attending an in-person event your staff coordinator will have already made sure that the location chosen is safe and monitored during evening programming. Please make sure to park near the building in an area that is well lit (when possible). Programs are run with at least two volunteers/ interns; Please stick together during your in-person events, support groups or educational classes to ensure each other's safety and the safety of those we are serving. Always</p>

		be familiar with your exit plan if there were to be an emergency.
Specific Policies to your Affiliate and External Stakeholders	This is to include any specific topic that you would like to address within your NAMI affiliate.	
Dress Code	To ensure that all volunteers are representing your NAMI affiliate in a positive & professional manner.	Volunteers and interns are responsible for presenting a positive, professional image to the people that we serve and the community as a representative of your NAMI affiliate. You should dress appropriately for the conditions and performance of your duties. This generally means that you would be business casual or casual (but appropriately covered) when representing your NAMI affiliate.
Liability	A liability policy helps protect your affiliate from claims that your affiliate caused bodily injury or property damage. It is important to mention misplaced items and injuries during an event or program.	
Reimbursement	It is important to include a policy on reimbursement if your affiliate can do reimbursements. This will give a clear direction to volunteers in what they can get reimbursed for if anything. Some items that can be reimbursed are travel, leading programs, and giving presentations.	

2. NAMI PROGRAMMING

NAMI stands out among mental health organizations for our commitment to peer education programs. NAMI trains volunteers to lead classes, presentations, and support groups in a variety of community settings. Hundreds of thousands of people are touched by NAMI programs each year. Our signature programs change lives and reduce stigma.

It is suggested that you provide a list of the programs that your affiliate(s) offer. This will give the volunteer an idea of how they are able to incorporate themselves into your affiliate. Affiliates are encouraged to include other programs they may run that are not NAMI signature programs. For example, CIT, Helpline/Referral, Mental Health First Aid, Kidshop, etc. Below are description examples of NAMI signature programs taken from The 2023 NAMI Signature Program Overview which can be found on NAMI.net or by using the link [HERE](#).

CLASSES

- **NAMI Basics:** An education course for parents and other family caregivers who provide care for youth with mental health symptoms. This evidence-based program is available online (Basics OnDemand) or in-person for 6, 2.5 hour classes on how to best provide support for their child. Also available in Spanish: Bases y Fundamentos de NAMI.
- **NAMI Family-to-Family:** An evidence-based, 8-week educational program for family, significant others, and friends of people with mental health conditions. NAMI-trained volunteer leaders educate about mental health diagnoses/symptoms, current therapies/treatments, communication strategies, coping skills, and self-care. Also available in Spanish: De Familia a Familia de NAMI and Mandarin.
- **NAMI Homefront:** An evidence-based practice and an adaptation of NAMI Family-to-Family, this education course is for families, caregivers, and friends who care for Service Members/Veterans experiencing mental health symptoms. The course consists of 6, 2-hour classes designed to help military/Veteran families understand mental health conditions and improve their ability to support their loved one.
- **NAMI Peer-to-Peer:** An 8 week 2-hour education and recovery course for anyone who is experiencing or has experienced the challenges of a mental health condition. Participants learn communication skills, strengthen relationships, and balance needs to better understand their mental health and recovery. Also available in Spanish: De Persona a Persona de NAMI.

- **NAMI Provider:** A course designed for healthcare professionals and university students who will be in contact with individuals living with a mental health condition and/or their family or loved ones. This course is designed to provide the insight needed to understand the importance of including individuals with a mental health condition and their families/loved ones as partners in the treatment process. NAMI Provider is a 15-hour program of in-service training taught by a team consisting of an adult (18+) with a mental health condition, a family member, and a mental health professional who is also a family member or has a mental health condition themselves. NAMI Provider is an evidence-based practice.

PRESENTATIONS

- **NAMI Ending the Silence:** A 50-minute presentation about mental health conditions in youth. Available for 3 audiences: students, families, and school staff. All versions educate about warning signs, what to do and the importance of early intervention. The presentation is an evidence-based program that can be offered in-person and virtually. Student presentation is also available in Spanish: NAMI No Mas Silencio.
- **NAMI Family & Friends:** is available as a 90 minute or 4-hour seminar version for families, partners, and friends of people with mental health conditions. It introduces participants to NAMI resources and programs and to key topics: symptoms, diagnoses, treatment options, and communication strategies. It's also an opportunity to meet other people in similar situations and gain community support.
- **NAMI In Our Own Voice:** A 60-90-minute presentation for the general public. The program uses personal stories to promote awareness of mental health conditions and of the possibility of recovery. NAMI IOOV is an evidence-based practice that is also available in Spanish: En Nuestra Propia Voz de NAMI.
- **NAMI Sharing Your Story with Law Enforcement (SYSLE):** A peer-led presentation that provides law enforcement audiences an opportunity to listen to the experience of someone who was in crisis and may have interacted with law enforcement as a result but is now living well with mental illness. This program is designed to help officers understand individual and family perspectives, how it affects them, and what recovery can be like for them with or without justice system involvement.
- **NAMI Hearts+Minds:** A program that focuses on the intersection of physical and mental health. NAMI Hearts+Minds can be presented in either a 1 day or 5 session format and is designed to educate and empower individuals to better manage their health, mental and physically. Available in Spanish: Corazones + Mentas.

SUPPORT GROUPS

- **NAMI Connection:** A 90-minute weekly or bi-weekly support group for adults (18+) with mental health conditions. Also available in Spanish: NAMI Conexión Grupo de Apoyo y Recuperación.
- **NAMI Family Support Groups:** A 60-90-minute weekly or monthly support group for family members, partners, and friends (18+) of individuals with mental health conditions. Groups are available online and in-person. Also available in Spanish: Grupo de Apoyo para Familiares de NAMI.

OTHER RESOURCES

- **NAMI Compartiendo Esperanza:** A 3-part video series that explores the journey of mental wellness in Hispanic/Latinx communities through dialogue, storytelling and a guided discussion on youth and mental wellness, community leaders, and Latinx families and mental wellness. More information on this resource can be found [Here](#).
- **NAMI FaithNet:** An interfaith resource network of NAMI members, friends, clergy and congregations of all faith traditions who wish to encourage faith communities who are welcome and supportive of persons and families living with mental illness which can be found [Here](#).
- **NAMI Frontline Wellness:** An initiative designed to support the mental health and public safety professionals by providing resources and tools developed specifically for these individuals and their family members. A series of 1-to-1 peer support leader trainings can be found [Here](#).
- **NAMI Sharing Hope:** A 3-part video series that explores the journey of mental wellness in Black communities through dialogue, storytelling, and a guided discussion on youth, community leaders, and Black families. More resources on this guide can be found [Here](#).
- **NAMI Smarts:** A hands-on advocacy training program that helps people living with mental illness, friends, and family transform their passion and lived experience into skillful grassroots advocacy. This can be offered as a series of three 1-2 hour workshops/modules or as a single full-day training. More on this training program can be found [Here](#).
- **NAMIWalks:** The largest mental health awareness and fundraising effort in America. NAMIWalks bring together thousands of individuals and supporters to celebrate mental illness recovery, honor those who have lost their lives to mental illness and help raise funds, combat stigma, and promote awareness. Reach out to your NSO for more details on how to create a NAMIWalks event for your community.

3. AFFILIATE EXPECTATIONS

On behalf of NAMI Ohio and our dedicated community, we extend a warm welcome to you as a valued member of our Affiliate Program. Our work is guided by principles of empathy, inclusivity, and respect. We support open communication, collaboration, and a commitment to creating safe spaces for everyone involved and we encourage you to demonstrate these principles when designing and communicating your expectations for volunteers. By upholding these principles, we can collectively make a positive impact on the mental health landscape.

- **Welcome:** Include a welcome statement in the beginning of your volunteer manual that reviews your NAMI affiliate's mission.
- **Communication:** Open communication with volunteers/interns about expectations stated within the position description, ongoing communication with volunteers on other opportunities available to them, on-going evaluations, and feedback, exit interviews.
- **DEI & EEOC:** (Diversity Equity Inclusion & Equal Employment Opportunity Coalition) Include DEI & EEOC descriptions and any prospective volunteer or intern who feels they may need special accommodations based on the impact of a disability is encouraged to communicate directly and openly with your NAMI affiliate so that alternative arrangements can be considered.
- **Training:** Affiliates should provide appropriate education, training, materials, and support to obtain base knowledge, successfully execute your duties, and grow within your commitment.
 - NAMINet, NAMI National trainings, Affiliate specific trainings, NAMI Signature Program Training, NAMI Ohio State trainings, Learning portal via nami.org via the volunteer's membership portal, and any additional ongoing enrichment opportunities.
- **Concerns:** Follow through on concerns, grievances, and corrective actions. More information on this listed below.

4. VOLUNTEER EXPECTATIONS

When compiling your specific affiliate expectations, please be sure to effectively communicate your passion and supportive nature for your community and your volunteers. Below are some pointers that should be elaborated upon when setting expectations for your volunteers and their commitments to community members.

Commitments Expected of your Volunteers

- **Scope of position** – Specific volunteer roles and expectations with guidelines as how not to represent NAMI outside of their volunteer role (ex: other business promotion, for profit promotion, etc.). Remember to utilize language from NAMI program manuals.
- **Attendance and punctuality** – Reporting to supervisors/coordinators when you can't fulfil a requirement, finding help within your volunteer group, and outcomes of what to expect when you can't fulfil a commitment (ex. Handbook [Link Here](#))
- **Dress code/Appearance** – Can vary depending on event and determined by your NAMI affiliate (appropriately for the conditions & performance of the duties).
- **Time commitment** - Utilize the language that is already within the Volunteer Application and the leader designations within the NAMI program trainings and their specific time frames (i.e., run 2 class within 2 calendar years of Family-to-Family training).
- **Communication** – Expectations around open communication within volunteer teams, coordinators, and staff availability changes which need to be communicated with your NAMI affiliate.
- **Reporting hours** – Review the process according to your NAMI affiliate standards.
- **Liabilities** – Items to consider: Personal belongings, driving or transporting on behalf of NAMI or using a NAMI vehicle (insurance), drugs/alcohol/weapons.
- **Ethics/Confidentiality** – Address NAMI standards of excellence, ethics, and confidentiality statements as provided in the Affiliate Handbook Template [found here](#). This can also be found in the Affiliate Operations Handbook located on NAMINet [Here](#).
- **Addressing Issues** – Items to consider: Appropriate chain of command communication responses, corrective actions, concerns, grievances with a review of step-by-step procedures and forms (ex: discrimination, self-promotion of facilitator, etc.).

5. VOLUNTEER CLASSIFICATIONS

This section focuses on different types or classifications of volunteers. Each affiliate can distinguish which type/classification of volunteers are needed and these can be tailored to fit your specific affiliate's needs.

- **Volunteer:** Volunteers can have a wide range of duties from leading programs to administrative support. Below are some examples of how to utilize volunteers.
 - **Program leaders** – individuals who lead NAMI signature or non-signature programs. These leaders are required to go through training.
 - **Special Event Volunteers** – individuals utilized for special events can help reach out to businesses for support, assist in finalizing logistics, hold a special role during the event, etc.
 - **Administrative Support** – preparing mailings, organizing supplies or files, faxing, copying, data entry, assembling resource materials, etc.
 - **Family Volunteer** – A family volunteer can lead a Family Support Group, Family-to-Family classes, and presentations that need the perspective of a family member.
 - **Peer Volunteer** – A peer volunteer can lead a Connection Recovery Support Group, Peer-to-Peer classes, and presentations that need the perspective of an individual with a mental health condition.
- **Intern:** Interns are advanced students or graduate students gaining supervised practical experience within requirements designated by the university. Interns assist NAMI staff on specific projects in a way that fulfills the educational requirements of their college or university internship program. Below are some examples of how to utilize volunteers.
 - **Marketing** – design and prepare specific marketing material for your affiliate.
 - **Helpline** – answer affiliate helpline and refer callers to resources.
 - **Program Coordination** – create a program schedule, handle registration and evaluation, gather program data, etc.
 - **CIT** – help with preparation for CIT trainings and recruiting lived experience speakers.

6. VOLUNTEER RECRUITMENT

This section focuses on ways in which to recruit volunteers. Each affiliate can distinguish which type/classification of volunteers are needed and these can be tailored to fit specific programming and affiliate needs.

Recruitment Ideas

- **Attending community events** – Community events include, but are not limited to activities on-Campus, community work & health fairs, presentations, NAMI programs and outreach to different community groups/companies/agencies.
- **Special events** – Activities provided by your NAMI affiliate, end of NAMI programs and classes, volunteer information on your NAMI affiliate website, etc.
- **Campaigns** - Volunteer recruitment campaigns via websites, social media, newsletters.
- **Volunteer Recruitment Sites**
 - <https://www.volunteermatch.org/>
 - <https://www.greaterclevelandvolunteers.org/>
 - <https://bvuvolunteers.org/>
 - <https://serve.ohio.gov/volunteering>
 - Tip: Internships can be posted on some of these sites as well, but some volunteer sites will not allow you to post internships. There are specific sites out there for internship recruitment. A common one that we use is “Handshake”: <https://joinhandshake.com/>
 - Internships usually require weekly supervision, a certain number of hours for each week or semester and have educational requirements that need to be met. You may want to consult with your local universities before opening internship positions. These positions should also have their own descriptions outlining roles & expectations.

Things to consider before recruiting:

- Establish volunteer position descriptions.
- Having your volunteer/intern application available and interactive on your website. Make sure you note where to send the application once it is complete or utilize online submission (i.e. Google Docs, Survey Monkey, etc.).
- Volunteer interview process (phone/zoom/in-person) and any materials to provide to the interested volunteer/intern.
- Provide program and NAMI Affiliate materials to interested candidates.

- Create a follow-up process for those who have expressed interest (email, phone call, text, etc.). Early follow-up may have a better outcome for interested candidates becoming volunteers.
- Create a process on how to keep track of your volunteers as they go through the process of becoming a volunteer/intern.

Considerations

- When partnering for events (i.e., NAMIWalks), some companies may provide you with volunteers for that specific event.
- Know that those who express interest in the beginning may not always follow through. Do not get discouraged when you run into this situation.
- Sometimes outreach emails may automatically go to junk/spam folders so different forms of outreach may be more successful (i.e. direct phone calls, text, group me apps, etc.)
- Make sure you are doing thoughtful recruitment. If you need leaders for a certain program, make sure you are recruiting around an upcoming leader training, so volunteers are not waiting around and become uninterested.

7. VOLUNTEER ONBOARDING

An effective onboarding process is designed to provide you with the necessary information and resources to ensure a smooth integration into your specific affiliate. Volunteers and interns play a vital role in the NAMI mission and together you are able to make a meaningful impact with your community. The onboarding process is a pivotal part of engaging your volunteers in programming and making them feel welcome.

Background checks, if applicable

- Examples of different background checks: FBI, State, BCI (basic and includes driving record and child abuse), and fingerprints.
- If someone has come from a different state, you may need to complete the federal or FBI background check.
- We suggest a basic BCI check if moving forward with a background check.
- Background checks are optional but may be best for board members, staff, and anyone encountering youth (ex. ETS and Youth Moves). Another consideration would be to check volunteer references.
- There is a cost for conducting background checks and may vary depending on where you get them. When you receive results may vary so your NAMI Affiliate should plan accordingly.
- Recommended systems for background checks:
 - <https://checkr.com/>
 - <https://www.ohioattorneygeneral.gov/Business/Services-for-Business/WebCheck/Webcheck-Community-Listing> - Local agencies may perform background checks.

Volunteer handbook creation process

See Attachment [Here](#).

- Welcome Statement
- Contact information and organizational chart
- Programs and expectations
- Policies and procedures

- Signature page of acknowledgment
- Any release forms (ex. Photo release form)
- Any other affiliate specific information that you want to include (Event Operation)

Orientation process

- This process can include: PowerPoint or documents that reviews programs specific to your affiliate, complete training applications, meet with individuals specific to the program you will be working with, sharing contact information, logging volunteer hours, staff introduction videos or description
- This process is recommended to start after any background checks are completed and the volunteer handbook has been reviewed and signed.
- Excel is a free way to keep track of your volunteers during your orientation process.
- A sample PowerPoint can be adapted and has been supplied [Here](#).
- Topics can include:
 - About your affiliate
 - Programs/Services
 - Organizational chart and contact information
 - Volunteer opportunities
 - Annual/Reoccurring Events
- This process can be done individually or in a group setting.

Personnel files/administration documents

- It is recommended that each affiliate keeps a file for each volunteer/intern.
- These files can include:
 - Program certificates
 - Signed handbook acknowledgement form
 - Emergency contact information
 - Any release documents
 - Copy of application with references
 - Copy of resume, if applicable
 - Copy of any letter of recommendations
 - Complaints or grievances
 - Short bio for speaking engagements, if applicable
 - Evaluations/check-ins/supervision/other meeting notes/communication
 - Any other personal or relevant information related to the volunteer/intern

8. MAINTAINING VOLUNTEERS

Keeping volunteers engaged and active can be difficult when activities are spread apart, trainings may be weeks or months out and volunteers have competing priorities. However, maintaining your volunteers does not have to be stressful! The below information is a compilation of ideas and best practices from NAMI Affiliates in Ohio. Adapting these to meet your specific Affiliate needs is encouraged.

Evaluations

- Check in with volunteers frequently.
- Some volunteers/interns have certain requirements for hours or evaluations (school requirements, etc.). Check in with those prior to utilizing your own and having to duplicate your efforts.
- Close the gap and create action plans or share feedback with Board members to ensure that the needs of the volunteers are being met.
- Exit evaluations – asks about overall experience, can be short and to the point, rewarding experiences, benefits you gained, was training adequate, utilizing skills, and if you could change anything about your experience, what would they be?
 - Can be done in a variety of different ways (email, in person meeting, fillable pdfs, survey style, etc.)
 - Offer a suspended period to provide an opportunity for the volunteer to return at a time that is convenient for them.
 - Depending on why they are leaving, you can provide information for the local NAMI at their new location, keep the door open if they decide they want to come back, etc. Ask if they still want to receive volunteer communications.

Volunteer Meetings

- Consider hosting Volunteer/Intern enrichment meetings – resume building, enhancing social skills, work etiquette, etc.
 - Enrichment meetings help to develop social skills and creativity. Everyone has a different style so get creative and use different styles within and/or between meetings.
- Quarterly (or regular) meetings for all volunteers to go over upcoming events, updates, and the opportunity for volunteers to provide feedback.
 - For feedback, you can create a SurveyMonkey, leave it open for the first month of every quarter and promote it at multiple times/different avenues (in person meetings, emails, etc.).

- Can include board members in the meetings for interaction between board members and volunteers
- Can provide upcoming events that volunteers can sign up for

Program Meetings

- Can group by Support Groups, Classes, Presentations, etc.
- Share strengths and barriers and how to overcome them
- Share progress & the impact they have made (i.e. data, feedback, etc.)
- Can be done monthly with their coordinator or within the quarterly meeting
- For online presentation trainings (Ending the Silence) – have meetings with experienced speakers and new speakers for an opportunity to provide feedback and how to tailor your story to your audience.

Support

- Help provide transportation when working in groups (carpooling). This can also provide another opportunity to catch up with your volunteers.
- Mindfulness activities/events (nature walks, yoga, etc.)

Recognition

- List board members as a group of people to include (board members are volunteers)
- Special shoutouts to new volunteers or current volunteers via social media or newsletters
- Awards/gifts at annual events
- Provide overview of volunteer work within your annual report
- Volunteer appreciation week activities (occurs in April)
 - NAMI National provides a media toolkit
- Highlight volunteers/interns through your annual walk
- Nominate your volunteers for different awards, activities, events (ex. NAMIcon)

9. TRACKING VOLUNTEER DATA

Tracking volunteer data is a crucial part of the organizational process and key to sustaining an active affiliate status. By meticulously recording the time volunteers dedicate to various initiatives, programs, and events, the affiliate is able to gain valuable insight, present data and the need for services to their community, demonstrate the impact of services, and obtain/retain donor support, grant funds, and more.

Onboarding documents/Volunteer Files

- Application, interview notes, signature pages, photos, releases, background check, signed job description, training certificates
 - Paper files, online software, excel sheets

Volunteer Organization

- Master list of volunteers, what programs they are leaders for, what activities they are willing to do, any specific notes
 - Can include: volunteer start date (end date), date of membership, date of training(s)

Volunteer hours

- Excel sheet, online software
 - **Online Software: Bloomerang, Apricot, Sharepoint, Business Volunteers Unlimited, Clockify, Volunteer Pro, Volgistics
 - Can be subscription based or free
- Volunteers may respond better with a personal reminder/interaction to enter in hours

RESOURCES

Volunteer Tracking Programs

Software	About	Cost	Affiliate Usage
Apricot	https://apricot.socialsolutions.com/auth	\$36 - \$100/month	Volunteer management, donor database
Bloomerang	https://bloomerang.co/	\$125 - \$775/month	Donor database, online giving, volunteer management, marketing and engagement, reporting and analytics, data management
Business Volunteers Unlimited	https://bvuvolunteers.org/	Free	Helps to find volunteers
Clockify	https://clockify.me/	Free – \$11.99/month	Manage staff and volunteer hours, track team activity
Sharepoint	https://www.microsoft.com/en-us/microsoft-365	\$5.00 - \$12.50/month	
Volgistics	https://www.volgistics.com/	\$17.00 - \$55.00/month	Keep track of volunteers, scheduling, reporting
Volunteer Pro	https://volpro.net	\$59/month	Helps to find Volunteers

- Affiliates can also choose to use an Excel Spreadsheet which can be found [HERE](#)

ATTACHMENTS

All attachments and examples can be found in the hyperlink [HERE](#). The below is a list of items which are included in the online library.

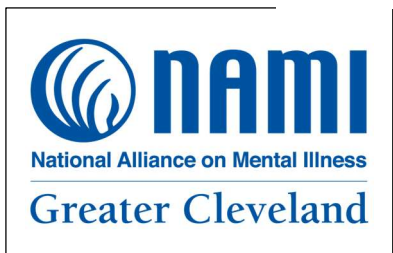
- Affiliate Handbook Example
- Position Description Example
- Application Example
- Interview Questions Examples – online resources
 - Provide phone interview vs in-person interview questions
 - Phone – more general/overall interest
 - In-person – more program/event (interest) specific
- Orientation PowerPoint Example
 - JEDI training
- Onboarding PowerPoint Example
 - Staff introductions – optional
 - Onboard Packet example – (i.e. background checks, data collection, volunteer hours, confidentiality & photography agreements, etc.)
- Evaluation Document Examples
 - Volunteer evaluations (ex. 6-months, 1-year)
 - Corrective Action example / Chain of command example
 - Exit interviews

Acknowledgements

Tracking volunteer data is a crucial part of the organizational process and key to sustaining an active affiliate status. A big thank you to all the partnering affiliates who assisted NAMI Ohio in completing this Volunteer Handbook! Please feel free to reach out to any of these individuals should you have any questions or concerns.



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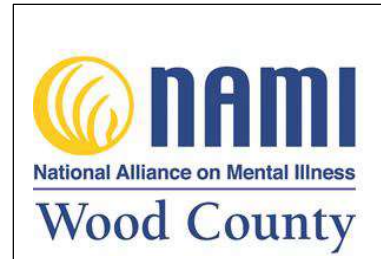
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