



Powerful Volunteer Connections: A Toolkit for Maximizing Your Organization's Volunteer Resources.



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POWERFUL VOLUNTEER CONNECTIONS

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A Toolkit for Maximizing Your Organization's Volunteer Resources

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MESSAGE FROM THE PRESIDENT AND CEO

The fact that nonprofits are fueled largely by volunteer activity is nothing new. A 2004 study conducted by the Urban Institute sponsored by the Corporation for National and Community Service and The UPS Foundation confirms that at least 400,000 organizations in the US are competing for this precious human resource to tackle the complex human, social and environmental problems facing our communities. Without a doubt, today's atmosphere of scarce resources and pressure for new or expanded services requires that nonprofits and government agencies maximize every available asset.

The first few years of this new century have been characterized by a spotlight on volunteering at the national level, and Americans are indeed continuing to respond to the need for their time and talents. In fact, the 2003 Bureau of Labor Statistics survey reported a 6.8% increase in the level of volunteering from the previous year. A renewed sense of community responsibility is evident as Americans seek more value-driven activity.

Yet despite this good news, many nonprofits report they have neither the resources nor the knowledge to engage and manage those volunteers as fully as they would like. Furthermore, the work of volunteers is often viewed as largely separate from other organizational operations, disconnected from planning, evaluation, and financial management functions. These issues point to the need for more capacity among organizations utilizing volunteers.

"Capacity building" has become a commonly used phrase to refer to efforts which help organizations become better equipped to achieve their missions. But few capacity-building projects have targeted the specifics of volunteer involvement. In recognition of this gap, the Points of Light Foundation & Volunteer Center National Network are now focusing new attention on the creation of more effective volunteer systems within organizations.

The four internal connections described on the following pages are indeed powerful keys to successfully harnessing the full potential of volunteering wherever it occurs. As discussion is stimulated among board members, senior leadership, program staff, and volunteers, new insights are gained and internal practices are improved which, in turn, generates increased benefits for the entire organization and those it serves. It is our hope that this publication serves as a practical tool for stimulating change in how entire organizations think and work, thus ensuring highly effective volunteer involvement that truly makes a difference.



Robert K. Goodwin

President and CEO

Points of Light Foundation & Volunteer Center National Network

INTRODUCTION: Using This Toolkit

Dear Reader:

No matter who you are, the fact that you have picked up this publication means you have an interest in the use and value of volunteers within an organization. This publication is a toolkit that can lead to doing things differently: managing a human resource — volunteers — to yield maximum, cost-effective, mission-driven results.

Perhaps you have some personal experience that demonstrates the need for improvement. If you work within a nonprofit or government agency, you are probably committed to your organization, passionate about its mission, and doing the job of more than one person. If you have been designated to coordinate and manage the volunteers in your organization, you likely have many more responsibilities as well.

Despite your interest in this topic, you may also be thinking: “I’d like to focus more attention on volunteer involvement, but how do I make that happen with so many other priorities?” This toolkit was designed with you in mind — to be user-friendly, versatile, and sensitive to the daily demands on your time. It is based on the premise that, with guidance, people can reflect on and learn about the way their organization works and then turn that knowledge into action to make the organization stronger and more effective.

FLEXIBLE CONTENTS

Be assured that you do not have to read the book from cover to cover and do everything that’s outlined here. The material is organized in a way that allows you to quickly access the parts of it that are most relevant to your situation.


- **Rationale and Relevance:** Chapter 1 offers a strategic view of volunteer involvement as a resource that can benefit all aspects of an organization’s operations. It presents perspectives from several different types of staff, as well as a valuable summary of current trends influencing volunteering today.
- **Overview:** Chapter 2 presents an overview of four internal connections that must be strong in order to ensure that volunteer resources are being used as effectively and efficiently as possible. These four principles are the foundation for this toolkit. From this point on, you choose how to proceed. One option is to assess the current level of capacity in your organization by using the simple survey tool provided. This is a relatively easy way to gather information from a variety of individuals within your organization and compare the results in order to identify areas that need further attention. However, if you feel you already know this, you can proceed directly to whichever connection you want to focus on strengthening.


- **Analysis and Reflection:** Chapters 3 to 6 each focus on one of the four connections. You may choose to start with any one of the four, based on the results of the assessment survey or your knowledge of the organization. You might also want to take a more comprehensive approach and examine each connection in turn.
- **Guided Discussion:** Each chapter includes a list of questions to stimulate group discussion about a particular connection. Receptivity to the innovative, high-impact involvement of volunteers is a matter of will as well as skill. If those you work with do not have the desire to integrate volunteers fully into the work of the organization, any skill training that is offered will have a limited return. Thus it is strongly recommended that you plan guided conversations among staff and volunteers at all levels using some or all of the questions provided. An external facilitator is extremely helpful to this process.


Open discussion in a safe and accepting environment is one effective way to develop will. Skill-building activities grow from, rather than substitute for, this essential groundwork.


- **Capacity-Building Action Steps:** Each chapter also includes specific, practical suggestions for increasing your organization's ability to maximize its volunteer resources. These suggestions are presented in a sequential order, meaning you can determine what pieces are already in place and begin to add others as appropriate. Some suggested action steps will require a bit more time than others, but all of them are doable and relevant. They are based on successful practices in real non-profits and can be adapted for both large and small size organizations. You decide which action steps best fit your organization's current level of capacity, priorities, and structure.


PRACTICAL TOOLS AND RESOURCES

Included with this publication is a CD  containing sample forms, worksheets, and articles related to the action step items. The intent is to provide practical tools that make it as easy as possible for you to take meaningful and focused action to strengthen each of the four connections in your organization. The electronic format allows you to adapt the tools to suit your needs, add them to existing documents you've developed, and share them with others.

In addition to the specific tools mentioned in each chapter, the CD  also contains the following items that may be helpful as you move forward with assessing your current capacity for volunteer involvement and implementing changes toward greater effectiveness.

CD  **Action Plan for Strengthening Connections:** If you decide to move through the assessment and implement some of the suggested actions, you may want to develop an action plan to capture all of the relevant pieces. This sample format provides an easy way to outline and track your activity as changes are implemented.

CD  **Identifying Solutions: Brainstorming and Creative Thinking:** Though brainstorming is frequently suggested as a problem-solving technique, we all know it can be done well or poorly. These pages outline an easy process to ensure productive creative thinking as staff and volunteers explore new ways of working together.

CD  **Volunteer and Staff Reactions to Change:** This document lists specific suggestions on how to minimize resistance to the new paradigm that may be unfolding in your organization. Both staff and volunteers need support as changes are planned and implemented.

OPTIONS FOR GETTING IT DONE

A variety of people at your organization can initiate this assessment process, just as the connections, discussion questions, and action steps can be incorporated into your organization's regular activities in a number of ways. Here are some suggestions:

- Ask an experienced and respected volunteer to lead this project. He or she could manage the organizational assessment process and work with a task force of staff and volunteers to discuss the findings and make recommendations.
- Make this a focus of a board retreat.
- Incorporate the organizational assessment and discussion questions into your strategic planning process.
- Involve volunteers in some of the discussion as part of an annual volunteer program planning event.
- Add the connections and action steps to your training manuals, effective practices, and/or orientation for staff and volunteers.

Finally, it is important to stress that this is not another book on how to recruit, supervise, and recognize volunteers, nor is it a book about doing more with less.

As stated at the beginning, this is a resource that can lead to

DOING THINGS DIFFERENTLY:

Managing a human resource — volunteers —
to yield maximum, cost-effective, mission-driven results.

Why Focus on Volunteer Involvement?

Consider the many resources that typically support a nonprofit organization's mission: money, physical plant/buildings, employees, volunteers, in-kind donations, gifts, equipment, and technology. All of these resources must be acquired, maintained, and deployed in line with agency priorities and goals. All must be considered during strategic planning and be managed by people with specialized skills.

This toolkit focuses on one particular resource: volunteers. If you are reading this, then your organization is probably one in which volunteers are already involved. As you are reading this, ask yourself if you're achieving maximum return on your investment in volunteers. Is this workforce being maximized as a mission-driven resource for your organization? If it isn't or if it could be further optimized, read on to learn more.

A STRATEGIC VIEW

Research has shown that some organizations do a better job than others at involving and managing their volunteers. Why is this? What are the factors that contribute to their success? What are the barriers organizations encounter that limit the effectiveness and impact of the volunteers they recruit? In part, the answers rest in the complexity of organizational life. Organizations are systems that are constantly interacting with their environments in ways that shape and reshape how work gets done and, indeed, even what work gets done. There is no single formula, no "magic bullet" that will allow an organization to dramatically transform the nature and scope of its volunteer involvement.

It is clear that the following factors are critical:

- The role played by top leadership and by managers at all levels of the organization
- The underlying attitudes, values, and beliefs that members of the organization have about the work being done and about the appropriate roles of paid staff and volunteers
- The clarity and breadth of acceptance of the organization's mission
- The policies and practices that shape the management of volunteers
- The quality of volunteers' performance and the extent to which their contributions are known and understood throughout the organization

It is equally clear that the interaction of these factors is most important of all. Thus, there must be conscious, deliberate attention to the process and dynamics of volunteer involvement. High-impact volunteering does not just happen; organizations that are highly effective at involving volunteers do not just happen. Both are the result of hard work, focused effort, and a commitment to excellence in achieving the mission of the organization.

Every organization has an existing paradigm related to volunteering — a perceptual map of reality and a belief system through which information is filtered and actions are influenced. This paradigm may have developed by default, with little intentional purpose or direction. Or it may have been shaped by previous or current leaders who asserted their opinions about how volunteers are involved in the organization's operations. This approach may have worked in the past, but research tells us that many organizations are losing valuable energy, time, and money because they have not updated their approach to managing volunteer involvement.

Volunteers can be a very cost-effective way to access all the resources of the community.

They can add both tangible and intangible value to any organization if viewed as a strategic resource and truly aligned with mission objectives and priorities.

A STRATEGIC APPROACH

- ✓ Volunteers are a finite human resource to be used as a strategy for accomplishing the priorities and mission of the organization.
- ✓ Management of volunteers is the responsibility of everyone in the organization, rather than belonging solely to a designated staff member. Policies and procedures affecting volunteers are developed jointly by those most knowledgeable, and top management is committed to reducing potential barriers.
- ✓ Volunteers are equal partners with paid staff, doing work that is necessary for improving or expanding services or programs. They are involved in a wide range of activities that often involve technical skill, responsibility, and even some risk.
- ✓ Volunteers have ideas to contribute beyond the specific tasks they are assigned to do. Their input into organizational planning and decisions is invited and valued as voices of the community.
- ✓ Utilization of volunteers is tied directly to the organization's strategic plan, and the results of their involvement are reflected in evaluation reports.
- ✓ Volunteers are thought of as providing access to all the skills and resources of the community. Efforts are made to tap a wide variety of individuals who have various expertise and perspectives to offer.

The purpose of this toolkit is to help organizations assess their own level of effectiveness in harnessing the potential of volunteering and to suggest some specific strategies and actions that can help build capacity. The material presented here may challenge not only the way in which your organization views volunteers, but also the nature of the work being done and the role of paid staff in doing that work.

BUILDING A STRONGER COMMITMENT

Your organization may include some individuals who resist the idea of devoting more attention to how and why volunteers are involved. You should anticipate comments such as the following:

“Volunteers have always helped us — why start focusing on this now?”

“There are more pressing issues this organization needs to address.”

“Isn't that the job of our volunteer coordinator?”

“All the volunteers seem happy, so why look for trouble?”

“Does this mean we're going to cut staff positions and bring in more volunteers?”

On the surface, these can seem like valid points that negate the need for in-depth assessment or examination of volunteer involvement. However, such comments may be based on invalid or outdated assumptions shaped by personal experiences, stories shared by others, and the lack of access to accurate information. The paid staff and top management might have a general lack of understanding about who is available to volunteer, how they

can be recruited to help, and the realities of day-to-day volunteer management. Such perceptions, while real to those who hold them, actually serve to restrict the potential impact of volunteers in an organization.

So why bother? What's in it for you and others you work with to spend time building the capacity to work with volunteer resources? The reasons are amazingly simple and straightforward:

- To meet real community needs
- To produce desired results
- To maximize limited financial resources
- To ensure that volunteers have a positive experience so they keep volunteering
- To sustain community support

In addition, here are how some peers and colleagues describe the relevance to their particular roles:

From board members: *"Direct service volunteers are an excellent source of new board members — If they really understand the whole organization and are committed to the mission. The more I know about who is involved currently, the easier it will be to identify individuals to serve on the board... The connection to mission has a direct bearing on recruitment success. If volunteers don't understand why this work is important, they will not want to give their precious time to it."*

From executive directors/CEOs: *"Our funders are asking for more concrete evidence of volunteer involvement that really makes a difference. This requires that function to be understood and supported by all members of my management team... This is really Volunteer Development, more than just the skills of volunteer management. It's a comprehensive approach similar to how we view raising money... We have to **make** the time for this — not wait till we have the time."*

From fundraising/development directors: *"Volunteers who feel strongly connected to our organization will be very likely to make financial contributions as well. And they will encourage their families and friends to do the same. In order to encourage this, I need to understand more about who is volunteering with us, what they value, and how best to invite their support... I can help the volunteers know what kinds of financial support we need, and they can suggest possible resources — if we are really communicating!"*

From evaluation staff: *"We cannot afford to squander any of our resources on activity that is not producing the real results we need. If I am not involved in assessing volunteer involvement, we are missing an opportunity to document the impact of their involvement on our mission."*

From a budget/finance director: *"Volunteers are a very cost-effective resource, but they are not free. The real costs involved need to be incorporated into our total organizational financial plan. But if I don't really understand why certain expenses are important, I can't advocate for including them in the budget."*

From a human resources manager: *"There are lots of similarities between what I do and what the coordinator of volunteers does. We both manage people to get work done, and there are a number of ways in which we can support each other. It's helpful when staff understand the similarities and differences between themselves and the volunteers, and we all work together to minimize the conflict and supervision issues."*

From a communications and marketing director: *"Volunteers are a key way for a community to learn more about an organization. Volunteers tell their friends, relatives, and others about their work and our programs. They help brand our agency in the community."*

From program staff: *"If I can more effectively delegate work to volunteers, I have more time to focus on the areas that require my special skills and attention...Often it's not a matter of spending **more** time with volunteers, but rather adjusting how we make use of that time to give us what we both need...Volunteers help personalize the organization for our clients. In return, the organization can use volunteer feedback as a barometer of community attitudes and support for our services...Volunteers should be used effectively. We can't afford to waste their time or mine...Volunteers can provide special attention and services that we don't have time or responsibility to offer."*

From volunteers: *"Fulfillment of our organization's mission depends on how well our volunteer tutors are connected to teaching staff. Better communication and support from staff would help me be a better tutor...I have yet to meet our board or executive director, or learn anything about them. Although I feel valued, I think better communication between the volunteers like me and the E.D. could facilitate more productive growth of our organization."*

21ST CENTURY REALITIES

One way to address some of your colleagues' doubts is to share some facts and figures about volunteerism today. While these trends are invisible to many in our society, they cannot be ignored. They have a profound impact on who is willing, able, and asked to give their time, with significant implications for any organization that depends on volunteers.

Nonprofit organizations and local government agencies alike are under increasing pressure to respond with greater impact to the complex human, social, and environmental problems facing our communities. Their work is being done in an atmosphere of scarce resources, demand for new or expanded services, and competition on many fronts. There is also a constant expectation from business and government community leaders and the public itself that volunteers can and should play a role in meeting community needs. Without a doubt, organizations must maximize every available asset in order to be effective under these conditions.

Volunteers are one of those assets, and like everything else, they must be recruited and managed in

sync with the social, economic, and demographic realities of today. Leaders in contemporary organizations who focus attention on updating their volunteer management practices are able to compete successfully for contributions of time and skills. Consider the following facts about who is volunteering, why they are volunteering, and the potential implications for your organization:

- **Management matters.** "Two out of five individuals have stopped volunteering for an organization at some time because of one or more poor volunteer management practices.... People are more likely to volunteer when they feel an organization is well-managed and will make good use of their time." (*The UPS Foundation survey, 1998*)

Implications for my organization: If volunteers feel their time and skills are wasted, they will not return. Their bad experience will negatively affect our image in the community, as well as our ability to attract more volunteers and other types of support. We will have to work harder and harder just to maintain the number of volunteers we have now if our internal management systems are weak.

- **Investment in staff to manage volunteers makes a difference.** The adoption of effective practices and the level of benefits derived from volunteer involvement are directly related to the level of investment in staff to manage this resource. Sixty-two percent of nonprofit organizations have a staff person designated as the coordinator of volunteers, yet the average amount of time spent on that function is only 30 percent. Of the organizations with a designated person in this role, only one in eight devotes 100 percent of their time to volunteer management (*Urban Institute Study, 2004*).
- **Growth in new nonprofits.** The number of 501(c)(3) organizations grew by 70 percent between 1991 and 2001. In 2001, over 783,436 charitable nonprofits were registered in the United States — most of which depend on at least some volunteers (*National Council of Nonprofit Associations, 2001*).

Implications for my organization: Our community has a finite number of potential volunteers, and competition is extremely fierce. We cannot afford to “waste” the ones we have, and we must maximize the impact of their involvement with our organization in order to sustain this cost-effective resource.

Implications for my organization: If we do not make this function a priority for staff time, we will miss out on additional value, results, and impact. Is the current investment of staff time adequate and appropriate to maximize the benefits we want to derive from our volunteer resources? How do we know?

- **Volunteers as donors.** Giving time and giving money are strongly linked. Volunteer contributors give over two times more on average than nonvolunteer contributors (*Giving and Volunteering in the United States 2001, Independent Sector*). Nearly two-thirds of Americans age 45 and older who give \$500 or more to charities annually report that they also volunteer regularly (*AARP Multicultural Study 2003: Time and Money*).
- **The Internet.** In 2001, 60 percent of those surveyed used the Internet to search for volunteer opportunities, learn about volunteer organizations, or engage in similar activities (*Giving and Volunteering in the United States 2001, Independent Sector*). Furthermore, a 2004 survey conducted by Volunteer Match documented that women are more likely to use Internet services than men (84 percent versus 16 percent) and that 25 percent of all users were first-time volunteers.

Implications for my organization: We must be visible on the Internet as a place to volunteer. This means making use of Internet-based recruitment services and ensuring that volunteering is seen as a valued part of our organization throughout our own website. Our Web managers must understand how volunteer involvement relates to everything else in the organization and help us send a positive, inviting message to everyone who visits our home page.

Implications for my organization: If our volunteers feel valued by all of us, they are very likely to support us financially as well. Fund development staff must be informed about who is volunteering with us and must work closely with the volunteer resources manager to determine appropriate strategies for encouraging volunteers to make monetary contributions.

- **The “ask” factor.** Individuals who are asked to volunteer are more likely to say “yes” (*Giving and Volunteering in the United States, 2001*,

Independent Sector; U.S. Department of Labor Study of Volunteering, 2003).

Implications for my organization: It is worth spending time and effort on strategic recruitment activities that target specific types of potential volunteers. We cannot expect most people to give their time to help accomplish our mission if we do not continuously invite them into our organization and provide a welcoming environment.

- **Episodic or short-term volunteers.** Increases in two-income families, single-parent households, aging parents that require caretakers, and the length of the work week have reduced the available time that many individuals have for volunteering. This makes episodic or “one-shot” opportunities especially attractive. Research by the Points of Light Foundation in late 2003 confirmed that the most frequently cited trend in volunteering is that “more people are interested in short-term or episodic volunteering.” In fact, 48 percent of volunteers 45 and older are engaged in sporadic volunteer activities (*AARP Multicultural Study 2003: Time and Money*).

Implications for my organization: The more scheduling options we have for people to volunteer with us, the greater our ability to attract them. While many organizations may need some volunteers to make longer commitments, short-term projects or tasks can often fit the needs of episodic volunteers. By identifying new ways to divide up the work or delegate pieces, we can tap those individuals who have limited time availability but still want to help.

- **Young volunteers.** Volunteering by high school students has reached its highest

level in 50 years. One-half of all high schools currently include a service-learning component in their curriculum. Furthermore, teens are nearly four times more likely to volunteer if they are asked than if they are not (*Youth Service America, 2003*). In addition, the steady rise in home schooling is creating a pool of young people who have the flexibility to volunteer during the day with peers and/or family members.

Implications for my organization: Are we equipped to tap this huge pool of energetic, willing, and available volunteers? How do we feel about empowering young people to help us think creatively and participate in mission-driven work? Are we ready to harness their entrepreneurial approach to problem solving? Does our organization view them as a resource or only a recipient of services? If we already have them involved, are we helping them really understand the impact of their service?

- **Family volunteers.** As early as 1987, a survey revealed that 55 percent of nonvolunteers felt that involving families would be an important incentive for getting them to volunteer. As organizations began to respond creatively to this idea, the level of family volunteering rose steadily. Today, more than 97 percent of agencies that involve families as volunteers find it to be a very effective and unique way to provide services.

Implications for my organization: By providing opportunities for various family groups to do important work for us while spending time together, we will attract new volunteers and eliminate some of the competition for their time.

- **Low-income volunteers.** While volunteers are abundant in low-income neighborhoods, they do not refer to themselves as “volunteers” but as “willing workers,” “block captains,” “community workers,” or “leaders.” Nor do they generally volunteer for established nonprofits. Rather, they tend to give their time through neighborhood associations, resident councils, and religious institutions and on an individual basis. Residents of low-income neighborhoods often face barriers to volunteering, such as childcare, transportation, low self-esteem, negative perceptions of volunteering, and cultural and language barriers. Yet mobilizing these individuals can be well worth the effort. Volunteer opportunities that create sustainable change, strengthen families, and transform neighborhoods may hold the key to helping some types of established nonprofit agencies address their mission more effectively.

Implications for my organization: If we are located in a low-income community, are we inviting local residents to partner with us? If those we serve come from low-income neighborhoods, are we open to considering how they might be engaged as “helpers” as well?

- **Mandated service.** Within the last decade, lawmakers have found ways to mandate community service as part of welfare reform, public housing eligibility, and alternative sentencing by courts. While tapping this pool of nonpaid workers does present some unique challenges, the good news is that many of them have time during core work hours — Monday through Friday, 9 to 5 — when many other types of volunteers are not available.


Implications for my organization: Have we considered how these types of workers might be a resource for special events or short-term projects? Can they be effectively teamed with more regular or skilled volunteers? Do the benefits of involving them outweigh the challenges?

- **Faith-based groups.** Two somewhat opposing trends affect religious groups today. On the one hand, Americans who contribute to or volunteer with religious groups give more time and money than those who are involved in only secular activities. On the other hand, the number of Americans who say they have no religious preference has doubled between 1990 and 2000 (*The Christian Science Monitor, 2002*).

Implications for my organization: If we have historically depended on faith groups as our source of volunteers, we may be facing the need to reach out to other types of potential volunteers. If we have not historically partnered with faith-based groups, this may be a good time to explore that as a way to build a more long-lasting base of support.

- **People with disabilities.** In large part because of the Americans with Disabilities Act of 1990, expectations are higher today among people with disabilities that they will be able to work, volunteer, and play wherever their interests and talents take them. Several million of these individuals are waiting to be asked to contribute their time as volunteers.

Implications for my organization: Can we afford to ignore this huge untapped pool of people as potential workers into our organization? Have we considered how they may be a good fit with the work we need done? In what ways are we making it clear that they are welcome?

These trends affect every organization that relies on volunteers as part of its workforce, and create a sense of urgency for examining who is currently involved, how their roles are structured, and how their work connects to everyone else in the organization. A summary of these trends is provided on the CD  for use as a handout, as well as a simple checklist for conducting an easy

“reality check” on how well your organization is responding to these factors.

A RELEVANT MANAGEMENT TOOL

Can your organization afford to function at an “adequate” capacity when it comes to volunteer involvement? If your answer is “no” or even “I’m not sure,” then read on. This guide is a practical and relevant management tool to enable staff, board members, and other leaders to do the following:

- Involve people within the organization in **examining and evaluating** what is happening related to volunteer involvement.
- **Influence attitudes** about volunteer involvement and allow volunteers to thrive in an environment of respect while conducting high-impact work.
- Create a more effective **volunteer involvement system** by identifying specific areas of strength and weakness.
- Yield the highest **organizational impact** from volunteer contributions.

This book is NOT about overall organizational effectiveness. It is very possible for an organization to be highly effective in achieving its mission and goals without any volunteer involvement. Similarly, even in organizations that are less effective in their overall utilization of volunteers, it is possible for individual volunteers or volunteer projects to make significant contributions. But is this enough? This toolkit will guide your organization in moving beyond isolated and limited success with volunteers to achieve even more far-reaching and consistent return on investment.

It takes a leader of unusual merit to say, *Yes, what we have is acceptable. The way we are doing things is adequate. But let's seek a better alternative anyhow. Truly great leaders are willing to risk changing what is acceptable and adequate before it ceases to work in order to try to move a step closer to excellence.*

—Gene Rooney. 1994.

The Simon Syndrome: A Wholistic Metaphoric Approach to 20th Century Problems of Leader, Leading, and Leadership. Reynoldsburg, OH:

L.E.A.D. Consultants, Inc.

CD TOOLS AND RESOURCES



- ✓ Current Trends in Volunteering: A Summary
- ✓ Current Trends in Volunteering: A Reality Check



Sources of Statistical Information about Volunteering and Volunteer Management

- *Managing Volunteers: A Report from The UPS Foundation*, 1998.
<http://community.ups.com/community/philanthropy/toolbox.html>
- *Volunteering in the United States, 2003.* U.S. Department of Labor.
www.bls.gov/news.release/volun.nr0.htm
- *Volunteer Management Capacity in America's Charities and Congregations: A Briefing Report*, 2004. www.urban.org
- *Time and Money: An In-Depth Look at 45+ Volunteers and Donors* from the AARP Multicultural Study 2003.
www.research.aarp.org/general/multic_2003.html
- *Giving and Volunteering in the United States, 2001*, Independent Sector.
www.independentsector.org/programs/research/gv01main.html



Highly Effective Organizations

In 1992, the Points of Light Foundation undertook groundbreaking research to better understand the ways people are involved as volunteers in human service organizations (health, education, social welfare and grassroots problem-solving). The focus of this work was to gain a better understanding of what differentiates organizations that are highly effective in involving volunteers from those that are less effective. The researchers defined “high effectiveness” as follows:


- The work of volunteers more directly contributes to the mission and priorities of the organization.
- There are fewer tensions present between paid staff and volunteers.
- The volunteer involvement has greater breadth and depth.
- There is less resistance to change and innovation in the roles played by volunteers.

In other words, these are the desirable results in organizations that do a better job of managing their volunteer resources.

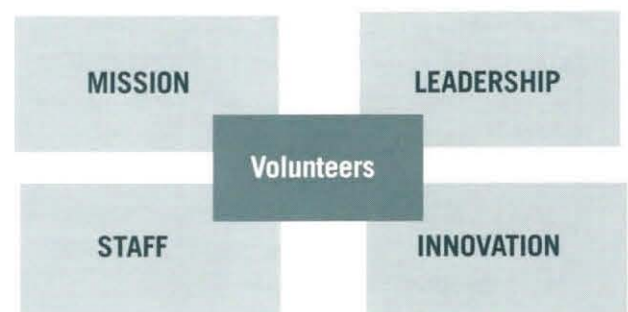
The research identified a number of characteristics of highly effective volunteer involvement that have subsequently been shared with hundreds of local and national nonprofit organizations; agencies of local, state, and federal government; and private and public funders. The reaction has confirmed a high degree of face validity; that is, these findings make sense to people from a number of varied perspectives. This toolkit has its roots in that original research but provides an updated and expanded view of highly effective volunteer involvement. More recent studies and experience provide additional strong evidence that internal structure, attitudes, and habits significantly affect an organization's ability to gain the greatest return on its invest-

ment in volunteers. Yes, the purely operational tasks of volunteer management are essential; these include role descriptions, recruitment, screening, training, recognition, and record keeping. But these operational activities must occur within a larger organizational context that supports and sustains the effort.

FOUR INTERNAL CONNECTIONS

Much has been written about the ways in which nonprofit and government organizations can benefit from partnerships and collaboration with other entities (i.e., external connections). Similarly, internal connections must be strong in order to ensure that all resources are being used as effectively and efficiently as possible. In the case of volunteer resources, there are four such connections. They are summarized on the following page (also available on the CD  and described in much more depth in Chapters 3 through 6).

Graphically, the relationship between these four elements and volunteers is illustrated below:



As Stephen Covey has said, “Leaders today are seeking deeper, more substantive solutions — they are tired of glitzy, quick fixes and superficial answers (aspirins and Band-Aids®). Instead, they want to solve the chronic, underlying problems and focus on the principles that bring long-term results.” These four connections are such principles.



The Mission Connection

The core purpose for the organization's existence is shared by paid staff and volunteers, and everyone has a clear understanding of how volunteers fit into the attainment of that mission.

When there is a successful mission connection, the priorities of an organization are framed in terms of the problem or issue the organization is addressing, and resources are allocated accordingly. The philosophy of why volunteers are involved is positive, clearly articulated, and widely shared throughout the organization. Volunteer roles are designed to contribute directly to the organization's mission.

The Leadership Connection



Management structures and consistent clear direction encourage and facilitate high-impact volunteer involvement.

In order to have a strong leadership connection, leaders at all levels—policy-making, executive, and middle-management—must work to support volunteer involvement in roles that yield significant results. A clear leader for volunteer involvement is present, but the volunteer management function is also well integrated into the organization's structure and operations. Potential barriers to volunteer involvement are identified and are dealt with forthrightly.



The Staff Connection

Staff and volunteers are viewed as valued contributors, working together as partners to accomplish the organization's work.

When the staff connection is at its best, paid staff is respected and empowered to participate in planning, decision making, and management related to volunteer involvement. There is a conscious effort to reduce the boundaries between paid staff and volunteers. Success stories about the contributions of volunteers are shared among both paid staff and volunteers.

The Innovation Connection



The organization is examining and improving its operation through workforce diversification, volunteer feedback, and the use of technology.

With a thriving innovation connection, the value of involving people, as staff and volunteers from all segments of the community, is recognized. There is an eagerness to improve performance and a conscious effort to learn about the volunteers' experiences in the organization. The organization keeps pace with changes in technology and continually explores its use for communication, data management, and provision of service and as a means of engaging volunteers.

ASSESSING CURRENT CAPACITY

The 2004 Urban Institute Study on Volunteer Management Capacity confirms that most non-profits say they value their volunteers. However, in many organizations, discussion of volunteer work falls outside the normal strategic planning or evaluation processes. Though the general concept of volunteer involvement is viewed favorably, the work of volunteers is seen as separate and distinct from the balance of work done in the organization. As a result, opportunities to learn about how volunteers and paid staff feel about the involvement of volunteers and to identify ways to continuously improve volunteer involvement might be less common.

From an organizational standpoint, there are three major reasons for conducting periodic assessments of how volunteers are engaged in your organization's work:

- 1. Assessment helps determine how to most efficiently utilize agency resources.** Boards and executive directors are faced with the need to make critical decisions about scarce resources, determining where the agency should devote its time, energy, funds, and workforce. An organizational self-assessment will identify whether the organization is getting maximum value from its volunteers and contribute important information to the planning process.
- 2. Assessment helps maintain maximum productivity and a positive public image.** The process identifies specific problems in mission understanding, systems management, roles and relationships, communication, and other areas. When these aspects of the organization's operations are ignored, the energy of all human resources (paid and volunteer) is often diluted and misdirected. This may also lead disgruntled volunteers to criticize the agency within the community. Periodic assessment can prevent small problems from becoming large ones.
- 3. Assessment develops a consensus for any needed change.** By involving everyone within the organization, this process creates the evidence of where changes are needed and builds an interest in making those changes. Agency-wide discussions about why and how volunteers are involved will begin to change attitudes and increase the will for success.

As you consider the four connections and how they relate to your organization, you may have two questions:

- 1. How can we find out how our organization measures up against these principles of high effectiveness?**
- 2. Once we know where our areas of weakness are, what can we do about it?**

This toolkit is designed to address both these questions.

If you wish to begin with an organizational self-assessment, the following steps are recommended:


Step #1: Build your own understanding

Familiarize yourself with the rest of this guide. Make notes on who in the organization needs to be involved. Determine who will manage and facilitate the process.

Step #2: Create a Leadership Team

This group will help build support for the process throughout the organization, analyze the results of the survey, and plan for future discussion and action. The size of the team depends on the size of your organization, but probably should be no larger than 10 members. The team should include at least one representative from the board of directors, senior management, middle management, line staff (professional and support), and volunteer groups (other than board members and including all major categories of volunteers such as fundraising, direct service, and administrative). Ideally, the team should report directly to the executive director. In addition, the board of directors should be fully informed about the work of the team and expect to receive periodic reports.


Step #3: Develop a plan

The team will begin its work together and develop a plan on how to move forward. A worksheet is provided on the CD  to help the team address key elements.


Step #4: Build internal support

Although support for this effort must first come from the executive director and board, it is equally important that everyone in the organization understand the intent and potential value of the process. People especially need to understand that this is not about evaluating individual performance. Rather, the process is designed to collect information about how paid staff and volunteers perceive the behavior of the organization in relation to the volunteer involvement.

Step #5: Collect the data


Based on the Leadership Team's plan, distribute the instructions and survey tool provided on the CD . The survey is a single two-sided sheet and includes an individual tabulation form. Since it will take only a few minutes to complete, a fairly short deadline is best and will yield the greatest response. It can be administered in a group setting (such as a staff meeting or volunteer gathering) or be sent individually by e-mail with a cover letter from the executive director. Each person should be asked to summarize his or her own scores and return the sheet to a designated person or location.

Step #6: Compile the results

This step will enable you to see common areas of agreement and disagreement. A software tool for tabulating the survey results is included on the CD .

Step #7: Analyze the results and plan next steps

When the survey scores have been tabulated into a report, the Leadership Team should meet again to review the results and begin to plan for future discussion and action. Because the four connections are the foundation for the survey and everything that follows, it is critical that all team members have a basic understanding of them at

this point. Sharing Chapters 3 through 6 is essential. More guidance on analyzing the scores is provided on the CD .

Step #8: Plan facilitated group discussions and actions

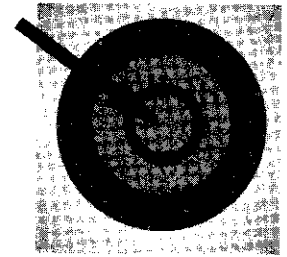
Once the team has identified particular connections that need more attention, discussions with groups of stakeholders will be helpful. Identify or create opportunities for groups of staff and volunteers to talk further about the issues related to each area. Use some or all of the suggested discussion questions in Chapters 3 through 6 as a guide, and plan for a skilled facilitator to guide the group. The following chapters also contain specific actions that can be taken related to each connection, and the team may want to suggest some of these at the end of discussion periods as possible next steps toward creating improvement and change.

At this point, each organization must develop its own action agenda depending on what is feasible, appropriate, and relevant to the desired results.

CD TOOLS AND RESOURCES:

- ✓ The Four Connections: A Summary
- ✓ Organizational Self-Assessment: Planning Worksheet
- ✓ Organizational Self-Assessment: Instructions and Survey Form
- ✓ Organizational Self-Assessment: Tabulating and Analyzing the Data
- ✓ Survey Analysis Tool and Instructions

The Mission Connection



The core purpose for the organization's existence is shared by paid staff and volunteers, and everyone has a clear understanding of how volunteers fit into the attainment of that mission.

This chapter examines the way in which volunteer involvement must be clearly connected to the fundamental purpose of your organization and be viewed as a resource to address current goals and priorities. You will do the following:

- Learn about key elements of this connection
- Read examples of how this connection is evidenced in real organizations
- Find suggested discussion questions for staff and volunteers to explore together
- Examine specific action steps to help your organization strengthen this connection

Much has been written about the development of organizational vision, mission, and values, and we sometimes use these words interchangeably. For the purpose of this discussion, the following definitions* may be helpful:

Vision: An image of the mission accomplished, the ideal future state

Mission: A task, purpose, or calling of an individual, team, or organization

Values: Beliefs or judgments about what is worthy, important that are reflected in individual and organizational behavior

Values, mission and vision guide the action of individuals, teams and organizations.

*Definitions adapted from Interaction Associations, LLC, NSL-FU, 1998.

Alignment of Mission and Resources

When organizations “keep their eye on the prize” — on the core purpose for which they were created — they tend to be better at involving volunteers in more meaningful, mission-focused roles. Leaders and workers in these organizations talk more about the importance of the work to be done and less about the immediate impediments to accomplishing that work. Both paid staff and volunteers know what the job of the organization is and use similar language when describing the purpose of the organization. They talk about community needs or problems and what their organization is doing to respond. From the volunteers’ perspective, it is often the nature of the mission, the “cause,” that attracts them.

The mission may be obvious, but the reality is that some organizations find it difficult to stay focused on it. They get distracted by immediate problems such as finances, status in the community, or competition from others. Sometimes, addressing these issues receives more attention and resources than mission-based activity. As a result, the roles of staff and volunteers are determined by the short-term hustle for survival rather than on activity that produces meaningful results to meet the real community need.

Positive, Clear, and Widely Known Philosophy

In highly effective organizations, both paid staff and volunteers easily and openly discuss the role of volunteers in terms of fundamental organizational values and philosophy. Leaders may or may not speak of their vision per se, but the

value of volunteer involvement is commonly understood and shared throughout the organization. For example:

"This organization was founded by volunteers, and volunteers still make the policy and guide the work."

"The staff here understands the importance of the work that we (volunteers) do. An important part of their job is helping us do our jobs."

"All of us are smarter than one of us. We share the same concern so we need to figure out together how to do it. We include volunteers in all aspects of school life, from meetings with parents to staff development."

In more effective organizations, this positive view is shared throughout the organization and reflected in public statements, documents, and informal conversations. How we talk about volunteers, even to ourselves, is critically important. The philosophy about the value of volunteer contributions must be continuously articulated from the top, heard by everyone, and backed up by action.

Mission-Driven Roles for Volunteers

When organizations see their problems as primarily financial, volunteers are often limited to fundraising or other resource-generating activities. In organizations that focus first on mission-based goals and objectives, volunteers are allowed to contribute to that work in a wide variety of ways, in addition to obtaining other needed resources. In essence, it's a matter of emphasis.

An **instrumental approach** regards volunteers as primarily fundraisers, providing the dollars to pay the people who do all the important work.

A **mission-based approach** regards volunteers as one of several resources available to get work done. The goal is to identify the most vital and effective places for them to be involved.

Does this mean volunteers should not be engaged in fundraising activities? No! Fundraising is a core task critical to the survival of virtually every nonprofit. The people best qualified to do it should be given that assignment, whether they are paid or volunteer. Similarly, people best qualified to tutor a child, intervene with a family in crisis, advocate for changes in public policy, or manage a surplus food program should be the ones given those assignments, whether they are paid or volunteer.

Organizations that think more broadly about the potential contributions of volunteers find that the fundraising results are at least as good, and often better, than if volunteers were restricted to that work only.

How Organizations Demonstrate a Strong Mission Connection

■ Example: Why Volunteers?

Example: Why Volunteers?

The mission of Agency X, a residential facility, is to care for children in a changing world. The administrator describes volunteers as being integrated throughout the organization. He sees volunteers as related to the core mission in two ways: by "Bringing outside reality in...that keeps us honest, connected to the outside" and by "Helping normalize things inside for the kids who live here, by helping to prevent or solve problems."

One of the residual benefits of volunteer involvement at this agency is its contribution to

public awareness about the organization. The top executives believe that all volunteers who are happy with their involvement will tell 250 other people about the organization every year. This translates into more volunteers and more financial contributions.

■ **EXAMPLES: Mission Statements Convey Link with Volunteers**

Some organizations convey this level of commitment to volunteer involvement in the organization's vision or mission statement:

"The County Juvenile Court is committed to the development of a public-private partnership which includes volunteers as an important and necessary ingredient in the development and delivery of services."

"The mission of FPOW is to provide companionship and an improved quality of life to Fairfax-area residents of nursing homes and assisted living facilities through regular pet visitation by trained volunteers and their approved pets."

■ **EXAMPLE: Volunteer Services Link to Mission**

Some organizations develop a separate purpose statement for the volunteer component of the organization that complements and supports the larger agency mission:

"The purpose of the Volunteer Services Department is to empower individuals to productively use their talents, skills, and gifts in providing the highest quality service to the patrons of the Allen County Public Library."

■ **EXAMPLES: Alignment of Mission and Resources**

A school places highest priority for volunteers on work with all aspects of operation, such as

teacher aides, individual tutors and mentors, management consultants for administration, and subject matter resources for teachers, and uses a business-school partnership as the source of volunteers. Corporate volunteers are engaged in most of what was happening at the school, including planning for new projects. Not only do the volunteers contribute as expected in each of these areas, but they also ended up playing a major role in securing tangible resources for the school, including money, equipment, and space for trainings.

In the fire service, there is a long tradition of volunteers as firefighters. But in District Three, Special Services volunteers fill over 14 different non-firefighting positions as well. Everywhere in the organization that paid employees work, volunteers are assisting. There are also several "volunteer-only" positions for which volunteers have office space, equipment, and computers. There is a strong belief that all volunteers are members and should have the tools to do the job they are assigned to accomplish. The integration of nontraditional volunteers has become an automatic process, and the expectation within the organization is that everyone is an equally valuable member — whether paid or not.

All of these approaches are valuable and valid. The critical element is that the organization consciously and publicly articulates the connection between volunteer involvement and mission, and takes a very broad view of how volunteers can contribute.

DISCUSSION GUIDE



The following are questions for reflection and facilitated group discussion among staff and volunteers related to the mission connection.

Basic Questions

- Write down what you think is the mission of this organization (without checking any notes or documents). Compare your statement with that of other team members. What are the similarities and differences? How often and how is our mission revisited with staff? With volunteers? By the board of directors? Is there a need for more frequent communication around our mission?
- How do you see your role connecting with that mission? Is the connection strong, or do you sometimes feel unclear about how the daily work you do contributes to achieving this mission?
- What do you see as the most important work that volunteers do here? Which volunteer work contributes most to the agency mission? Why?

Intermediate Questions

- Do you think the organization has a clear philosophy of why it is using volunteers and what it wants volunteers to do? Why or why not?
- Why do you think this agency utilizes volunteers as part of its workforce? From your perspective, what are the advantages and disadvantages of having volunteers involved?
- Is there anything that volunteers bring to the organization that is unique or different than what staff brings? If so, what?
- In general, what kinds of work or tasks do you think are suitable and best for volunteers to do here in our organization?
- How do we measure the value of volunteer involvement in our organization? How do we know if they are contributing to our mission?

Complex Questions

- What types of interaction are there between board members and the rest of the organization (staff and volunteers)? How does the rest of the agency know what the board does and who they are? Would additional interaction or information sharing be helpful? If so, what might we do differently?
- What are the differences and similarities between policy level volunteers (board or advisory) and direct service volunteers? How does each perceive the other? What is similar and what is different about the roles they play in our organization?
- What degree of coordination and communication exists between the agency's volunteer resources and development functions? How do you see volunteers related to fundraising? Are they the only ones who can do it? Is fundraising the only thing volunteers can do for us? How do we know?
- How do we define volunteer? Does our definition include interns; court-ordered, mandatory service workers; AmeriCorps members; loaned executives; or other nontraditional volunteers? Why does having a definition matter? Do we have agreement on this definition within the agency? What are the implications of this definition for data collection, evaluation, recognition, and supervision?

CAPACITY-BUILDING ACTION STEPS



Getting Started

- Post the organizational vision, mission statement, and values in several prominent places where staff, volunteers, and the general public will see them.
- Ask all staff to develop a statement about how their role connects to the mission. Share it with everyone for discussion and education. Then do the same with volunteers.
- Construct an organizational chart that accurately depicts both staff and volunteer roles. A sample is provided on the CD. Use this as a tool for educating everyone about the extent to which volunteers are active throughout the organization, including the board. Post the chart where it is visible to everyone, even visitors. Discuss why volunteers are and are not active in certain program or service areas.
- Establish a few designated opportunities for informal interaction between board members and other volunteers so that they can get to know each other and better understand each other's role and history with the organization.

Getting Stronger

- Ask volunteers who have been around for a while to participate in the orientation program for new board members, sharing organizational history, anecdotes, and their view of the mission.
- Form a task force of staff and volunteers to review the organization's vision, mission, and/or value statements. Explore how language might be modified or added to reflect a commitment to effective volunteer involvement. Use the examples given in this chapter as a starting point. A suggested process on how to develop a purpose statement is included on the CD. A related

article describing another model for developing organizational commitment is also included on the CD.



- Invite a few staff and volunteers to draft an organizational definition of volunteer. Use the list of scenarios and terms on the CD as a starting point for discussion. Talk about the various terms being used today and the language that will best reflect how you want volunteers to be viewed, such as volunteer staff, volunteer program, volunteer resources, or community partners. Identify ways in which this language can be incorporated consistently into agency documents, website, publications, staff and volunteer orientation materials, letterhead, and business cards.

Maximizing the Connection

- Create one to two seats on the board of directors for direct service volunteers, either as voting members or ex-officio members. Actively seek their opinions and perspectives during board discussions. Ask volunteers to serve on board committees, especially those related to finance, programs, and planning.
- List all the ways in which volunteers participate in the following types of activity:
 - Directly supporting the work that paid staff does
 - Intensively working on behalf of a single person/client
 - Extending the work of the organization to new audiences
 - Building public understanding and support for the organization

How does this list compare with the list of actual position descriptions for volunteers? Could new positions be created to address one of these categories? How can we begin talking about volunteer involvement in these terms? Or would we like to strategically expand one of these focus areas, and how can volunteers help with that? Remember:

the goal here is not necessarily to have more volunteers involved, but rather to ensure that the existing volunteers are being utilized in ways that directly affect the mission.

- Create a task force of staff and volunteers to identify how resources are currently allocated to achieve mission-based work. A worksheet for this activity is included on the CD . Discuss ways in which volunteer resources might be re-assigned or new volunteer roles developed in order to more directly contribute to high-priority work. This exercise can clearly demonstrate how volunteers are critical to achieving desired outcomes. Consider using it as part of reporting to funders, elected officials, etc., as well as a volunteer recognition tool: it can graphically illustrate how volunteers are really making a difference.
- Revisit all existing position descriptions to determine if they are stated in results-oriented terms. Instructions and samples are included on the CD  as a guide for revising your content and format. This task is best done by the volunteers who hold each position and the staff who directly supervise the position; a team approach will result in wording that is accurate, clear, and strategic.

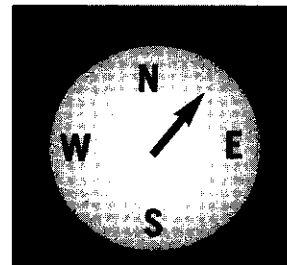
CD TOOLS AND RESOURCES:



- ✓ Sample Organizational Chart
- ✓ Developing a Purpose Statement
- ✓ Article: "Building Commitment for the Volunteer Program: A Replicable Model"
- ✓ Exploring Definitions and Terms
- ✓ Aligning Volunteer Assignments with Organizational Priorities
- ✓ Designing Strategic Volunteer Position Descriptions, Samples, and Suggested Format

The Leadership Connection

Management structures and consistent clear direction encourage and facilitate high-impact volunteer involvement.



This chapter examines how leaders at all levels of the organization can share responsibility for effective volunteer involvement through structure, roles, and policy. You will do the following:

- Learn about key elements of this connection
- Read examples of how this connection is evidenced in real organizations
- Find suggested discussion questions for staff and volunteers to explore together
- Examine specific action steps to help your organization strengthen this connection

A Role for Everyone


In more effective organizations, shared leadership for volunteer involvement is reflected among the executive, the designated director or manager of volunteers, and the managers of other key functions. Ensuring that volunteers are appropriately assigned and supported is a collective responsibility, and everyone understands how their piece relates to the whole. Responsibility is jointly owned and translates into concrete, collaborative actions that inevitably lead to an expansion and strengthening of volunteer involvement.

This team approach is based on the belief that volunteer resources management has a connection to strategic planning, information technology, fund development, evaluation, and personnel. Just as it is everyone's job to respect the limits and guidelines used in managing the organization's financial resources, it is also critical for everyone to understand how they contribute to effective

volunteer resources management. Not only does this approach foster more sustainable success, it also avoids the need for heroic leadership on the part of any one individual who is charged with "making the volunteer program work." This approach has practical implications for communication, inclusion in planning processes, and access to decision-making power.

Clearly, support from the top executive is critical. That person provides the sanction that others need to make things happen with volunteers. Yet that top leader is only like a stone dropped into a tranquil pool: the splash catches your attention, but it is the ripples caused by the initial splash that ultimately move the boat. Middle managers and other function experts are the ripple-makers, playing a vital role in developing the systems and policies that will maximize volunteer involvement.

Focused Yet Integrated

All organizations that utilize the services of volunteers must designate a primary manager of this human resource. The placement of this manager varies from organization to organization, and several models work well, depending on the size of the organization. (Brief descriptions of several models are provided on the CD ) In the most effective organizations, pieces of the volunteer management function are also well integrated into the organization's overall structure and operations. The key to maximum effectiveness is to achieve a balance between centralized leadership and decentralized operational management.

The responsibility for management of volunteers should be shared with staff who have a vested interest in the success of volunteer placements. When tasks related to planning, budgeting, data management, and evaluation are spread out among many units of the organization, the sense of ownership increases among all staff, and the amount of creative energy surrounding the utilization of volunteers is multiplied. It also empowers people other than the single designated coordinator to make decisions about volunteer involvement. Those day-to-day operational decisions are made as close to the action as possible, resulting in a broad-based commitment to continuous improvement of the volunteer effort.

Choosing a more decentralized approach does not mean that the need for a designated director of volunteer services or volunteer resources manager disappears. It simply changes the focus of this role. These individuals function as internal consultants to facilitate change, redesign work processes, empower program staff, and build new skills among volunteers. Most important, these individuals act as true leaders, inspiring others with a vision of how the contributions of volunteers can be maximized to support the organization's mission.

Barrier Busting

While issues related to liability, confidentiality, geographical location, and scheduling are real in most organizations, they can also become false barriers that mask or rationalize more deeply rooted resistance to volunteer involvement. Leaders in effective organizations are committed to resolving these issues through dialogue and creative thinking so that they do not become unnecessary roadblocks to meaningful volunteer roles.

In our litigious society, organizations must be concerned about issues of confidentiality and liability, but in less effective organizations, these issues tend to become generalized into opinions or attitudes such as "Volunteers can't be trusted to keep information confidential" or "It's too risky to have volunteers do that task." Such statements are often based on inaccurate information or assumptions. As such, they quickly become brick walls that severely limit the ways in which volunteers can be deployed and utilized. While some limits need to be in place, highly effective organizations approach these issues with an exploratory attitude of "Is there a way we can make this work?" They recognize the issue, name it, treat it like any other problem to be solved, and proactively look for ways to reduce or eliminate barriers in order to maximize the benefit of their volunteer resources.

How Organizations Demonstrate a Strong Leadership Connection

EXAMPLE: Ongoing Shared Leadership

A large urban hospital created a coordinating committee for volunteering that includes the hospital administrator and his deputy, the head of nursing, the head of social services, the director of volunteers, and the volunteer leadership of the hospital's five auxiliaries. They meet monthly for lunch to discuss issues related to volunteer involvement in the hospital. One outcome of their meetings was the creation of a discharge service in the main lobby staffed by volunteers. Volunteers at the information desk identified the need and created the concept, and then the committee reviewed the idea, strategized how to make it happen, and helped launch it. Leadership was shared throughout.

EXAMPLE: Cooperative Management in Action

The Appalachian Trail is managed through a cooperative management system involving 75 state and federal agencies and an affiliation of 30 volunteer-based trail clubs. Only 60 staff members have specific trail-wide responsibilities, while day-to-day management is delegated to the clubs, who have more than 4,500 active volunteers. Furthermore, a council of club representatives deals with trail-wide issues and reports directly to the board of directors. Building and maintaining volunteer capacity is addressed in every employee's position description. The trail literally would not exist without volunteers, and every employee understands this.

EXAMPLE: Administrative Staff and Clients Learn by Volunteering Together

Two and a half years ago, a local mental health organization that had never utilized volunteers decided to develop a new "volunteer corps," composed of consumer/clients who are disabled, have mental health issues, and are considered seriously mentally ill (SMI). The concept quickly grew from six volunteers and two activities a week to 332 volunteers and 198 activities a month.

While this success was impressive, the corps coordinator realized that most administrative staff seldom interacted with the SMI population and lacked understanding about the rehabilitation services department. To remedy this, she created an in-house Make a Difference Day, offering staff a fun opportunity to give something to the community while learning more about the volunteer corps participants and their countless successes. Staff chose a weekday or evening volunteer activity they wanted to be part of and arranged their schedules to accommodate their workweek. Says the coordinator, "It was a real eye-opener and inspiration for those that volunteered with my teams."

EXAMPLE: Barrier Busting in Action

In Hospital A, volunteers on the children's ward are neither expected nor encouraged to observe anything about the patients with whom they work. They have no access to information about the child's illness or treatment program, nor about the child's family. They are simply expected to come and play with the children.

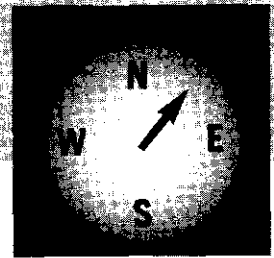
In Hospital B, volunteers are encouraged to be familiar with their patients' cases and are trained to observe the children. They are asked to report their observations to the nursing staff through the use of an information log kept in each ward. Indeed, paid staff in this hospital become frustrated when volunteers do not fulfill this expectation and fail to record their observations.

Hospital B is more effective in utilizing its volunteers as an additional resource to improve patient care, while simultaneously protecting confidential information.

EXAMPLE: A Volunteer Experiences Physical and Attitudinal Barriers

At a state psychiatric facility, I worked as an intern with patients in classes they attended three days a week for more than two months. Everyone needed a pass to go into any of the classrooms and to get in and out of the facility. The facility didn't give me a pass or even a name badge, just a name tag that read "volunteer." Therefore, I couldn't get into the building in the morning, go to lunch, or leave or get to any of the classes without assistance. And the staff was annoyed at having to constantly help me move throughout the building because they were very busy. This made me feel as though I wasn't respected by the patients or the psychiatrists/ teachers because I was "just a volunteer."

DISCUSSION GUIDE



The following are questions for reflection and facilitated group discussion among staff and volunteers related to the leadership connection.

Basic Questions

- Who is in charge of managing volunteers here? What role do you think that person plays in this agency? How do you work directly or interact with that person?
- Have you seen any written rules or policies about the utilization of volunteers in this organization? If so, what types of things do they address? Do you think unwritten rules or assumptions about what volunteers can and cannot do are present? If so, what are they?
- Do you think that volunteers in the agency have the resources they need to do their work effectively? If not, list specific examples.
- What is the process for recruiting volunteers to serve on the board or committees? Are direct-service volunteers ever considered for these types of positions? Why or why not?

Intermediate Questions

- Do you think the leaders of this organization value volunteers? What specific things have you seen or heard to suggest that they do or do not?
- Are there things that the agency does, or doesn't do, that you have seen hinder the participation of volunteers? If so, what?
- What is the process for handling problems encountered with volunteers? Has this been effective? Why or why not? How might this process be improved?
- In what specific ways are the various leaders of the organization (board, top managers, support staff, etc.) currently involved in decisions related to volunteer management?

Complex Questions

- What is the process for handling a person who comes to the agency and wants to

volunteer? Is everyone clear on this process? Does it work well for staff? For the volunteer? How do we know? What might be done to improve this process?

- Would you describe the management of volunteers in this organization as a centralized or decentralized approach? Why? What are the advantages and disadvantages of the approach being used?
- What do you think is the biggest barrier to making better utilization of volunteers at the agency? Has that concern ever been addressed or dealt with? How? Do you have suggestions for how this barrier might be reduced or eliminated?

CAPACITY-BUILDING ACTION STEPS

Getting Started

- Plan a discussion among policy-making, executive, and middle-management leaders around the following statements:

"I believe that volunteers _____."

"The best thing about working with volunteers is _____."

"The worst thing about working with volunteers is _____."

"My biggest concern/fear about having volunteers work in this organization is _____."

Discuss the reasons behind their statements and possible strategies for addressing concerns and frustrations while maximizing the positive aspects.



- Identify the specific roles that each of these groups play in promoting and supporting volunteer involvement:
 - Board members
 - Executive director and other senior managers
 - Middle managers/supervisors

How do they do it? How visible are they? Identify ways in which any of these people could become more involved in order to increase efficiency or effectiveness.
- Consult with human resources staff or other experts about liability coverage, grievance procedures, format of position descriptions, etc., for volunteers. Consider how these issues are handled for employees and can be similarly addressed for volunteers.

Getting Stronger

- Make volunteer resources a regular topic on board meeting agendas. If you are the volunteer coordinator, suggest that you contribute and/or participate. If you are the executive, ask the manager of volunteer resources to present regular reports, written and/or in person. These reports should include statistical data, examples of who is volunteering, the impact of their activity, recent community contacts, and current challenges or issues that need attention.
- Offer periodic opportunities (once a year?) for board members and the executive director to “shadow” volunteers as they do their work, or take them on a tour of volunteering so they can observe and meet a variety of volunteers in action. This can be fun, educational, increase familiarity, and demonstrate a top-level interest in how volunteers are contributing. It also provides an opportunity for personalized recognition of both volunteers and the staff who supervise them.
- When planning new projects or programs, invite some current volunteers to participate in these discussions to share their ideas and perspectives.

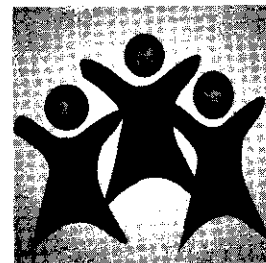
Maximizing the Connection

- Create a volunteer management advisory team composed of representatives from all areas of the organization, such as the board, senior management, line/program staff, finance, information technology, and direct-service volunteers. Take care that upper-level managers do not dominate in number or in decision-making. Convene this team on a regular basis (quarterly or semi-annually?) to discuss policy changes, barriers, shifts in volunteer roles, and similar issues. CEO or senior management endorsement of such a group is essential to its effectiveness.
- Work with your human resources staff to form a task force to examine the current role of the designated coordinator of volunteers. Does the position description accurately reflect the best role for this person? Does the job title need to be changed in order to convey the complex resource management aspects of this position? Is this position appropriately located within the organizational structure to facilitate responsive action and the elimination of potential barriers? Examples of effective job descriptions for volunteer resources manager positions are provided on the CD .
- Review all pieces of volunteer management against all potential players within the organization. Who needs to be involved in what pieces in order to eliminate potential barriers and facilitate success? A matrix worksheet for this exercise is provided on the CD .

CD TOOLS AND RESOURCES:

- ✓ Models of Volunteer Resources Management
- ✓ Sample Job Descriptions for Volunteer Resources Managers
- ✓ Sharing the Volunteer Management Function worksheet

The Staff Connection



Staff and volunteers are viewed as valued contributors, working together as partners to accomplish the organization's work.

This chapter focuses on how a mutually supportive relationship between paid staff (especially program line staff) and volunteers can minimize frustration and accomplish common goals. You will do the following:

- Learn the key elements of this connection
- Read examples of how this connection is evidenced in real organizations
- Find suggested discussion questions for staff and volunteers to explore together
- Examine specific action steps to help your organization strengthen this connection

Respect and Empowerment

Research indicates a direct correlation between the effectiveness with which an organization involves volunteers and the regard in which it holds its paid staff. In more effective organizations, people at the top talk about their employees in highly respectful terms: their skills, knowledge, and commitment to the mission. These leaders reflect a high degree of trust in their colleagues and therefore invest a great deal of responsibility in them. Most important, staff is given a high level of control over their own work, including how to delegate to and partner with volunteers. In highly effective organizations, paid staff are comfortable with their own roles and thus not threatened by volunteers as teammates.

By contrast, less effective organizations exhibit an atmosphere of distrust, alienation, and tension. Employees are often more concerned about protecting their own individual jobs rather than the mission, and leaders may spend significant time developing ways to control their workers. In such

organizations, volunteer involvement is limited, almost happening in spite of the organization instead of because of it. Volunteer placements tend to be in relatively routine roles, and decision-making about their involvement is more centralized and controlling. Staff members may feel frustrated about not being able to move ahead positively to develop expanded roles for volunteers, or they may be very hesitant to share their workload with these "outsiders."

The line between paid and unpaid workers is not as clear and firm as some believe it to be. The fundamental issue is whether those who supervise are able to trust the volunteers to be responsible for their work, to commit themselves to the organization's mission, and to devote their energy and talent to achieve the best possible results.

Appropriate Boundaries

In this context, the word boundaries refers to the distance or tension between paid staff and volunteers based on how they describe themselves and how they describe the other group. Such boundaries will always exist to some degree because there will always be differences between paid staff and volunteers. What differentiates organizations is the "thickness" of those boundaries, or the degree to which these differences affect the ability of staff and volunteers to work together.

Highly effective organizations take deliberate steps to strengthen the working relationship between paid and volunteer staff and to increase the sense of working together toward a common goal. Barriers to interaction or policies and practices that foster inequity are recognized,

and attempts are made to lessen their impact. In these organizations, the boundaries are “thinner” and more permeable. Conscious efforts are made to reduce the differences and to emphasize and act upon their commonality. Negative feelings or tension related to identity, control, skill level, and payment are talked about openly and acknowledged, and then specific strategies are developed to increase comfortable interaction, cooperation, and true teamwork.

At the end of the day, the ultimate distinction remains: paid staff receives financial compensation, and volunteers do not. Yet sometimes staff may wish they were getting some of the same rewards from their work that volunteers do. For example: a nurse in a children’s hospital comments:

“Here’s why I resent volunteers. The children love them because all the volunteers have to do is play with them and create fun. I’m the one who has to hurt them with the shots and tests, so they cry when they see me coming.”

No amount of money can make up for this fact, but increased awareness on both sides may lead to new ways to demonstrate mutual support for each other as they provide the best possible health care for the children they serve.

The Power of Storytelling

Hearsay evidence about volunteering has tremendous impact. Paid staff who share negative experiences or examples of poor volunteer performance reinforce attitudes that devalue and limit volunteer involvement. Conversely, when staff tell positive stories about the work of volunteers, other supervisors and managers are influenced to reframe their attitudes, which lead to new opportunities for volunteers to demonstrate their value. In other words, a cycle of positive self-fulfilling prophecy is created.

Even stories about the historical role of volunteers in creating the organization or their response in times of organizational crisis can have a powerful effect on the current institutional view of volunteer involvement.

Positive stories about volunteers are important background noise that supports effective volunteer involvement. They keep the role and work of volunteers in front of everyone and call attention to the contributions they are making. Stories also directly contribute to the widely shared vision that is such a large part of the mission connection.

Organizations, like communities, have cultures that are sustained from generation to generation. Indeed, the presence of these cultures is reflected in the fact that new members (employees and volunteers) very quickly learn how an organization works, what is valued, and what is not. In this age when many nonprofits experience frequent staff turnover, it is more important than ever to ensure a continuity of culture through stories. In some cases, volunteers may even have more longevity with the organization than most staff, and they can be a valuable resource to help sustain the core values and spirit behind the stated mission.

Beyond Training and Recognition

It is important to note that the volunteer-staff connection is not about more training and recognition. Yes, it is important to help volunteers develop the knowledge and skills they need to perform the roles to which they are assigned. It is equally important to train staff in how to supervise volunteers appropriately. However, no amount of training can overcome the myriad barriers that organizations can build around volunteers to limit their work, their contribution to the mission, and their level of satisfaction.

Similarly, it is the quality of volunteer recognition — not quantity — that makes the biggest difference over the long haul. Highly effective organiza-

tions empower their volunteers by respecting their potential contribution, designing roles through which those contributions can be maximized, and strategically working to increase the impact of their volunteer resources. When these elements are in place, elaborate recognition ceremonies and presentations of memorabilia become much less important to the quality or duration of volunteer involvement.

Recognition of staff contributions also has direct relevance to this connection. If the goal is true collaboration, then all members of the team need to be applauded and acknowledged for their contributions to mission-focused work. Rewarding successful joint efforts goes a long way toward fostering mutual respect, commitment, and satisfaction among both employees and community volunteers.

How Organizations Demonstrate a Strong Staff Connection

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EXAMPLE: Empowering the Staff Experts

An elementary school leaves the ultimate decision about the nature and scope of volunteer involvement in the classroom to the individual teachers. An overall framework provides consistent guidance regarding security, confidentiality, and the philosophy of volunteer involvement as a valued part of the educational process. But decisions as to which volunteers do what and when rest with the teachers themselves. The principal regards them as the experts on what they need to enhance their classroom learning and their students' needs, and trusts them to work out the details of volunteer involvement appropriately.

In this situation, the designated coordinator of volunteer involvement focuses on locating potential community resources, providing teachers with ideas and successful models that have been used elsewhere, planning school-wide recognition,

gathering data on the impact of volunteer involvement (on students, teachers, and the community at large), and assisting if problems arise.

■ * * * * *

EXAMPLE: Training to Enhance Comfort and Success

The state director of an intergenerational education program ensures that the local program coordinators who work with volunteers are comfortable handling difficult situations in volunteer management. In quarterly meetings, they have addressed issues of risk management and volunteer supervision, including discipline and dismissal of volunteers. In addition, coordinators ensure that teachers and principals have a decision-making voice in designing and implementing the program in schools where older adult volunteers mentor and tutor. By advising on the training volunteers will need in order to participate in the program, teachers and school administrators feel confident that volunteers are well prepared to serve in their assigned roles. The state-level staff has also provided some area school personnel with sensitivity training on aging and older adults, helping them understand important issues and easy ways to make accommodations.

■ * * * * *

EXAMPLE: Put It in Writing for Clarity and Comfort

Staff at a national recreation area can rest assured that volunteer roles are carefully planned. The National Park Service issued a five-page Director's Order that outlines the work that volunteers can and cannot do. This document, along with clear position descriptions, makes all the difference in reassuring staff that volunteers are there to assist and support them, not take their place. Staff members are consulted from the early planning stages for any new volunteer positions. Policy guidelines from senior management

send a consistent message that volunteers are important members of the Park Service team.

■ *[Decorative separator line]*

EXAMPLE: Overcoming Resistance One Step at a Time

In order to increase staff buy-in at a mental health services center, the coordinator of volunteers utilizes several strategies:

- Asking a colleague from another organization to conduct training on volunteer supervision
- Speaking individually with coworkers about their needs, sharing this information with her supervisor, and suggesting ways volunteers might help
- Maintaining a list of current volunteer skills (updated each month) and distributing it to staff. She encourages them to speak with her if they see a skill they would like to harness but are not sure how to do it
- Producing an annual report of volunteer accomplishments, demographics, and dollar value

Over time, these actions are breaking down barriers among staff and volunteers and are increasing the volunteer involvement in assisting staff with their own work as well as serving consumers.

■ *[Decorative separator line]*

EXAMPLE: Thick vs. Thin Boundaries

In Agency X, everyone wears a name badge. On the paid staff badge, the person's name is most prominent, with job title in smaller letters underneath. On the volunteer badge, the word volunteer is most prominent, with the person's name in smaller letters underneath.

In Agency Y, all name badges show the person's name in large letters, with job title or role underneath in smaller letters. The paid staff badges are all red, and the volunteer badges are green.

Which agency exhibits a thicker boundary between paid and unpaid workers? Agency X emphasizes the difference in pay status by label-

ing volunteers as such in a highly visible way. Agency Y places equal emphasis on each individual's name and function within the organization and uses color as a more subtle way to differentiate between employees and volunteers.

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EXAMPLE: Collecting Stories

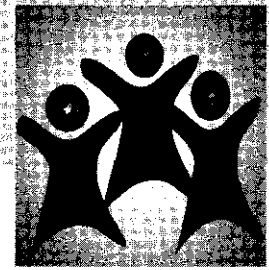
A local faith-based organization uses volunteers to provide friendly visits and companionship to neighbors with mental illness. This program hosts an annual "Evening of Stories" at which board members, staff, and volunteers gather to share the heartfelt and moving stories of how the organization is making a difference in people's lives. This event reinforces the team commitment to the mission and the fact that volunteers are an important part of that team. It also provides board members and staff with genuine stories they can share with the community as they build public awareness, raise funds, and recruit additional help for the program.

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EXAMPLE: Annual Recognition Becomes a StoryFest

The annual OPB volunteer party is a time for presenting awards to those who have given various levels of service. The staff member who has worked most closely with the award recipient introduces him/her and tells a little bit about what the volunteer has done for OPB. In addition, the staff member shares at least one story about the volunteer which often reveals more details about the impact of that person's contribution. Senior management is expected to participate, and the word has spread to make this a highlight of the organization's activities each year. Not only do more and more staff now attend regularly, but the story-telling format has led to a noticeable increase in their understanding of the real role played by volunteers.

DISCUSSION GUIDE



The following are questions for reflection and facilitated group discussion among staff and volunteers related to the staff connection.

Basic Questions

- Why do you think volunteers would want to work here? What do you think gives them the most satisfaction? What frustrates them? What have you heard them say about being part of this organization?
- Have you ever asked someone you know to volunteer here? Why or why not?
- What influences the degree of trust we have in volunteers and the work they do?
- What, in your view, is the ideal relationship between staff and volunteers? How well is that relationship working here? What have been your previous experiences, both as a volunteer in some other setting and as a supervisor of volunteers?

Intermediate Questions

- How do individuals know they are valued by this organization, from both the volunteer and staff perspective? How does staff know they are appreciated? Where does the greatest amount of appreciation come from? The least amount? How do volunteers know they are appreciated? Where do the highest and lowest amounts of recognition come from? What could we do differently to help each other feel more recognized for our value to the organization's work?
- What are the best examples or stories you have heard about the contributions volunteers make to this organization? How did you learn about these things? Are these stories widely known by staff and volunteers? How can these stories and others like them best be spread in the future?
- As a staff member, what percentage of your time do you spend working with volunteers?

Is this enough, or would you prefer more? What challenges do you encounter when supervising volunteers? What do you enjoy most about teaming with volunteers to accomplish work?

- How does working with or supervising volunteers affect your own career advancement, negatively or positively?

Complex Questions

- Who makes the decisions about how, when, and where volunteers are involved? How much authority do volunteers or staff have in that process? If a volunteer wanted a different position, would that be possible? How would he or she go about requesting a change? What possible advantages would there be to changing some of this decision-making process?
- In general, do you think that any particular tasks or roles should not be handled by volunteers? Why? Conversely, do you think that certain tasks or roles might be a good fit for volunteers to take on? Why?
- In what ways are the concerns of staff about volunteers addressed? Do they have the opportunity to discuss how volunteers affect their own roles and how they do their jobs? How could such opportunities be created or enhanced?
- What are the consequences of poor volunteer supervision on:
 - Volunteer retention?
 - Volunteer performance and well being?
 - Agency service delivery?
 - Agency image in the community?

- From both an organizational and personal perspective, how does our work schedule affect volunteer involvement? What options could we explore to introduce more flexibility to facilitate volunteer involvement?

Questions Specifically for Volunteers


- Do you think your role as a volunteer is clearly defined? Why or why not? When was the last time that you had a discussion with a staff person about your position description?
- How well does your supervisor keep you motivated to do your work? Can you think of any specific examples where your supervisor definitely influenced how you felt about being part of this organization (negatively or positively)? Are there things your supervisor could do to make your work more effective or to help you feel more positive about your involvement with this organization?

CAPACITY-BUILDING ACTION STEPS




Getting Started

- Examine what type of training/orientation is provided to staff about working effectively with volunteers. Discuss with staff what type of information or guidance they would find helpful. Is experience in working with volunteers a factor in hiring new staff? Part of new employee orientation? Invite experienced volunteers to be part of these orientation sessions.
- Develop a standard Volunteer Agreement form that outlines the general responsibilities of the organization and the expectations of volunteers. This type of document should not replace more detailed position descriptions or policies. However, it can serve to convey to volunteers the seriousness of their

involvement and remind staff of their supervisory responsibilities. A sample agreement form is provided on the CD .

- Invite various types of staff (not just the designated coordinator of volunteers) to attend volunteer meetings (orientation, ongoing training, auxiliary meetings, etc.) to listen, learn, and get to know them.
- Create easy mechanisms for staff to provide volunteers with information about changes, needs, projects, etc. This could take the form of monthly e-mails, bulletins posted near the sign-in areas, conference calls, and weekly and/or monthly stand-up touch-base meetings.
- Periodically ask volunteers what supplies/support they need to do their work. Don't assume supervisors know this.

Getting Stronger

- Ask staff to make specific contributions to volunteer newsletters and recognition activities so that these messages are coming from people other than just the designated volunteer resources manager. Help staff understand how they can use these tools for sharing positive feedback and demonstrating how a problem was solved or a new idea implemented.
- Prepare a fact sheet for distribution to staff that answers basic questions they may have about volunteer involvement such as: What kind of people volunteer for our organization? What happens when you make a referral? What do I do if I need a volunteer? How can I count on volunteers to help me? What's in it for me? Can volunteers replace paid staff? Use it as part of orientation packets for new staff and incoming board members and as a tool for building relationships with departments that have not yet utilized volunteer resources. This is especially valuable for larger, more de-centralized situations. A sample fact sheet is included on the CD .

- Develop written guidelines for staff and volunteers regarding expectations for responsibilities and reporting. Prepare volunteers for what to expect in terms of staff roles — not just their own. Help everyone understand how they fit into the bigger picture.
- Create a partnership award to recognize staff and volunteers who are working together well. This could be focused on a single staff member, an entire department, or a program.
- Review what type of training or job preparation volunteers are receiving. Identify ways this could be improved without adding significant burden to the staff supervisors.

Maximizing the Connection

- Hold a “dream” session with staff and volunteers: What have you wished could be done to improve or expand services, but didn’t have the time, expertise, or permission to try? Ever have a great idea you just have never gotten around to doing? Capture all the ideas that surface and create a task force to look at them more closely to see if they might be new mission-focused roles for volunteers (instead of something currently being done).
- Gather quotes and anecdotes from staff and volunteers about how they have successfully worked together to do something important. This is a great task for a volunteer or a board member (the “storyteller”). Share these with the entire organization in a variety of ways: newsletter, bulletin board, website, e-mail broadcast, speeches, recognition activities, etc. Doing this once or twice a year will result in enough material to use during several months, and, over time, folks will begin to look forward to being asked to tell their story. This is a simple way to reinforce the positive power of effective teamwork.
- Work with human resources staff to create a task force to examine the extent to which the primary volunteer management functions

— recruitment, placement, training, supervision, evaluation, and recognition — are the responsibility of the paid staff with whom the volunteers work most directly. Incorporate these responsibilities into position descriptions to accurately reflect how that staff position supports volunteer involvement. Include it as a performance measure or accountability indicator to stress its importance. Identify the amount of time spent on these tasks and ways to measure performance. In other words, hold staff accountable for good volunteer management practices.

- Create a task force of staff and volunteers (both new and experienced, board and direct service) to examine the extent to which the following boundaries are evidenced in the organization. A worksheet for this exercise is provided on the CD. Identify specific examples of how these boundaries are thick or thin.

Identity – How are staff and volunteers identified to one another? To the general public? Do our actions convey equality and mutual respect?

Control – What are our perceptions about the ability to control people and their work? How are supervision problems handled? Who has a right to speak up if control issues are present? Are staff and volunteers held to the same basic standards of accountability?

Skills – What are our assumptions about who can provide specific expertise needed by the organization? Do the skills of volunteers duplicate those of staff, or are they different? What is the value of various skill sets in relation to our mission?

Turf – To what degree do staff and volunteers share the same domains (e.g., physical space, meetings, training, on-site and off-site work, etc.)?

Payment – What are our perceptions about how various workers (staff and volunteer)

are recognized and rewarded? Is there a sense of fairness and equality, or is there resentment that some work is more highly valued than others?

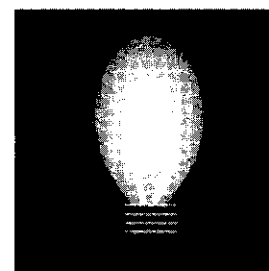
Wherever thick boundaries are identified, develop specific options or recommendations for how they might be lessened. Present these ideas to top management and/or the board of directors.

- If paid staff and/or volunteers are feeling unappreciated or your regular “recognition” activities do not seem to be valued by volunteers, create a task force to explore other possibilities. Conduct a mini-survey or 20-minute brainstorming session to elicit feedback and creative new ideas. Is volunteer recognition regarded as an event or a process? Are you still doing the same thing you did 10 years ago, even though it isn’t as successful? How can recognition and rewards become more personalized and flexible to meet the various motivations and values of individual staff, volunteers, and programs? How might staff and volunteers be recognized for what they have achieved together? Involving many people within the organization in this process will definitely yield high quality decisions about what changes to make.
- Ask volunteers to periodically assess staff they work with, whether they feel valued, whether they are receiving adequate support, and what they like best about working with those staff. Share positive feedback with staff, and use the information to identify needs for additional coaching.

CD TOOLS AND RESOURCES:

- ✓ Sample Volunteer Agreement
- ✓ Sample Fact Sheet on Volunteer Involvement
- ✓ Examining Boundaries Between Staff and Volunteers Worksheet

The Innovation Connection



The organization is examining and improving its operation through workforce diversification, volunteer feedback, and the use of technology.

This chapter discusses the benefits organizations derive when they update how they recruit, communicate with, and collect data from their volunteers. You will do the following:

- Learn about key elements of this connection
- Read examples of how this connection is evidenced in real organizations
- Find suggested discussion questions for staff and volunteers to explore together
- Examine specific action steps to help your organization strengthen this connection

Experts in management and organizational development are making the case that an organization's ability not only to survive but also to thrive in the future is directly proportionate to its capacity to learn. By that they mean that the people within organizations, both individually and collectively, need to develop the ability to reflect on their work and a willingness to uncover, understand, and reconsider the basic assumptions that underlie the work they are doing. This includes considering the possibility that some of those assumptions are no longer valid and that they limit the way we think and thus the way we behave. You may have recognized the need in your own organization to reexamine some past or current practices, in which case this chapter can help you do just that.

While many executives and board members are quick to recognize the need for change in how they fundraise, address personnel issues, and conduct marketing, they are less likely to focus on updating their volunteer management strategies. Yet the social, economic, and demographic realities of today, as listed in Chapter 1, have a direct bearing on your ability to attract and retain volunteer involvement.

Diversity as a Goal

Achieving a diverse workforce, both staff and volunteer, can be a particularly difficult aspect for organizations to tackle because discussions of inclusiveness or diversity can quickly become tinged with controversy and defensiveness. But in an increasingly multicultural world in which a variety of lifestyles, cultures, age groups, and value orientations seek to coexist, attention must be given to these issues.

An organization's activity around diversity begins with a very basic philosophy about the value of involving many types of people as volunteers. Consider these contrasting statements:

Organization A: "It is not important for us to have volunteers from the client group we serve because anyone who is properly trained can relate well enough to our clients."

Organization B: "Our customers are better served if they are interacting with volunteers who share their cultural values and language."

Organization C: "The kinds of volunteers we have now are working just fine, so there's no need to look at involving other types of people in our community."

Organization D: "By actively inviting a variety of community residents into our organization as volunteers, we are increasing our pool of potential workers and donors, gaining access to an array of resources, and strengthening public support for our mission."

The difference between more effective and less effective organizations is the extent to which they recognize the importance of diversity and inclusiveness and are attempting to find answers appropriate to their community and their organization. While true diversity is rare and difficult to achieve, highly effective organizations recognize the potential benefits of new perspectives, credibility, access to new sources of volunteers, and improved service delivery. These organizations struggle more openly with how they can increase the involvement of people who typically have not volunteered to work with them.

Leaders in highly effective organizations speak knowledgeably and sensitively about the changing demographics of their communities. They understand the trends toward ethnic and cultural diversity and the differences among Baby Boomers, Generation X, and Generation Next. They do not avoid the issue of inclusiveness with general statements like “our services transcend differences among people.” They recognize the inherent importance of engaging people from all these groups as volunteers in order to remain truly responsive to the total community. Most important, they openly struggle with how to achieve that broad engagement because they believe it will strengthen programs and services, not because it is the politically correct thing to do.

Listening to Volunteers

Through a variety of techniques, highly effective organizations try to learn as much as possible about their volunteers, what motivates them, and the quality of their experience with the organization. This information provides important clues as to how the organization must adapt and change in order to sustain this important human resource.

One way to characterize these organizations is to say they are never satisfied. No matter how good

their engagement of volunteers, they are not content to sit back and let things chug along status quo. As we know, continuous process improvement requires ongoing feedback from all customers, and these organizations regard volunteers as one of the many sources of information about how well their customers are being served.

Because volunteers (both new and experienced) view the organization from the community perspective, they may have insights that differ from those of the staff. They are usually very willing to offer constructive ideas and assist with problem solving — if invited to do so. Furthermore, when some of their ideas are actually implemented, a cycle of positive investment that leads to improved retention, motivation, and impact is established.

The Relevance of Technology

Today’s professionals have adopted rapid communication as the standard way of conducting business. E-mail, instant messaging, Web-enabled phones, and other means of electronic communication set a high standard for rapid response to inquiries. An organization that cannot respond quickly to someone expressing interest in volunteering will lose many potential volunteers during the lag time. Furthermore, the ability to communicate electronically with current volunteers can greatly enhance supervision, recognition, and evaluation.

Expectations are equally high when it comes to websites. Nothing is more disappointing than visiting a site that hasn’t been updated in a year or two. A webpage should represent the most current information available and provide easy navigation to the parts you want people to find. When it comes to volunteer recruitment, the messages need to be inviting, highly visible, and easy to follow. An out-of-date or too-general website pegs your organization as behind the times and will cause potential volunteers to pass you by without a second look.

As noted in Chapter 1, virtual volunteering is a growing mode of engaging volunteers in the work of organizations around the world. No longer does a volunteer need to come into your office to be of assistance. Volunteer writers, editors, graphic designers, and other professionals in the publications field can provide valuable service to your organization from the comfort of their homes and studios. Similarly, tutors, mentors, buddies, and other one-on-one client-serving volunteers can provide such support by phone, e-mail, and/or Web chat. If you are already successfully involving volunteers on-site and have the capability to communicate via the Internet, you can easily expand your operation to include virtual volunteers.

Volunteer information is valuable human resources data and should be treated as such. Your organization should have a data management system in place to ensure the data are kept secure, organized in an efficient manner, and retrievable when needed by the people who need it. Technology offers a range of options that make it easy to generate reports about both the quantity and the quality of volunteer involvement, which in turn leads directly to continuous improvement.

How Organizations Demonstrate a Strong Innovation Connection

EXAMPLES: Creatively Matching Supply and Demand

For several years, a large metropolitan science museum has filled the daytime weekday need for volunteers with 12- to 18-year-olds who are schooled at home by their parents. The students help at the visitor services area and, in return, gain experience and skills in public relations, science education, and business practices.

A social service agency provides childcare services for parents who are participating in counseling sessions. The childcare area is staffed by military personnel who are stationed at a base nearby and have flexible work schedules. This assignment is attractive to soldiers who are away from their own children, nieces, and nephews and provides a welcome contrast to their highly structured work environment. In return, the children benefit from excellent role models, and the agency can depend on this highly reliable pool of volunteers.

EXAMPLE: Very "Able" Volunteers Contribute Great Value

A museum uses individuals with disabilities in many different roles. A blind docent (and a guide dog) volunteers two days a week and is given a ride by another volunteer, who won a recent award not only for his dedicated service, but also for his enabling her to volunteer. Another volunteer is deaf and serves as a junior docent (under 18) in special events programs doing crafts with kids. Two other docents are volunteers who use wheelchairs. Two volunteers have suffered head injuries: one is a docent, and the other works with museum stores. Another individual has a special needs diploma (mental retardation); he has been a good volunteer and now is also a ticket taker staff member. All of these people are willing and able!

EXAMPLE: Teams Create and Nurture New Ideas

At a local senior center, volunteer teams quickly assume the management of new projects. When a program is first initiated, volunteers are invited to form a new team under the direction of the volunteer services coordinator. As the project matures and the number of team members

increases, a team leader is selected to guide the project. There are now over 25 volunteer teams that individuals can choose to join.

■ **EXAMPLE: Assessing Satisfaction**

A local social services agency conducts an annual volunteer satisfaction survey. The results are tabulated by program area, and a summary report is provided to each volunteer supervisor. Each program engages its advisory committee or other key volunteers in reviewing the survey results and developing action steps to address the findings. Brief articles are also included in the volunteer and staff newsletters.

■ **EXAMPLE: Taking Feedback Seriously**

In a local police department, the annual evaluation of volunteers includes a program evaluation component in which volunteers are asked to provide feedback to the organization. These are read carefully by the volunteer resources coordinator and are also shared with her supervisor. Suggestions and comments are reviewed at the highest level and taken seriously.

■ **EXAMPLE: Volunteers Support Changes in Numerous Ways**

EXAMPLE: Volunteers Support Changes in Numerous Ways

A public radio station used Survey Monkey® software to get feedback from volunteers about some proposed changes – and were amazed at the input received which significantly contributed to the planning. Recently the station has transitioned to the use of computers to take pledges during the annual fundraising campaign, rather than the pencil and paper approach that had been in place for decades. Volunteers of various levels assisted with testing

the computers in the development phase (working with staff on this), and helped design and implement training of volunteers on the new system. Because the organization is so dependent on volunteers for the pledge drives, it was essential that everyone feel comfortable to the introduction of computers. Success was assured by involving volunteers heavily in each step of the transition.

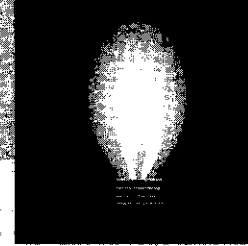
■ **EXAMPLE: Technological Talent Widely Used**

EXAMPLE: Technological Talent Widely Used

A large aquarium utilizes a number of volunteers with computer skills to support programs throughout the organization:

- Two volunteers help with data entry and producing reports.
- A volunteer develops PowerPoint® presentations for the volunteer orientation and to educate docents on specific topics. These are available for volunteers to check out so that they can learn at home.
- Several volunteers maintain the e-mail notification lists to ensure quick and efficient communication among all volunteers and special teams.
- The volunteer newsletter is designed and edited by a virtual volunteer who rarely sets foot in the building.
- A volunteer maintains the aquarium's entire website.

DISCUSSION GUIDE



The following are questions for reflection and facilitated group discussion among staff and volunteers related to the innovation connection.

Basic Questions

- What discussion has occurred in the organization regarding diversity of staff and/or volunteers? Who was involved in that discussion? Did anything change as a result?
- How would you describe the “ideal” volunteer for our organization? Why?
- Describe a typical volunteer on the board. What is that person like? Where does he or she come from? How are potential board members identified and recruited? Would particular types of individuals strengthen the board if they were added? Why or why not?
- Describe a typical nonboard volunteer here in our organization. What is that person like? To what extent do the volunteers reflect the ethnic, racial, economic, age, and gender makeup of the community we serve? How do we know? Are people we seek to serve also involved as volunteers or board members? Why or why not?
- Do we know why volunteers leave this organization? How do we know this?

Intermediate Questions

- Who keeps track of what the volunteers do? Who needs this information? Is the current system effective? Why or why not?
- If you were completely in charge here, what are three things you would do to improve the involvement of volunteers in our organization?
- How do we learn what our volunteers are interested in or need to do their work well? Do we act on that information once we have it? If so, how? If not, why?

- Do volunteers attend or participate in staff meetings? Why or why not? What advantages might they bring?
- How do various staff and volunteers in the organization regard the use of technology? To what degree is it relevant to each department, program, or area of activity?

Complex Questions

- What is the biggest change that has occurred in this organization in the past five years? Who was most affected by this change? Was this change viewed as a positive or negative by staff? By volunteers? How do we know?
- Do volunteers ever have good ideas for improving the way the agency does things? What are some examples? What happens to these good ideas? How do we learn about these good ideas? Do we provide a continuous feedback loop to demonstrate that we have heard their ideas and been influenced by them?
- How often are volunteer resources discussed at staff meetings? At board meetings? What types of issues are usually talked about? Are decisions made as a result of this discussion?
- Who knows the most about volunteers in this organization? What kind of reports, data, or statistics does that person collect and prepare? Who else has access to that information? Would it be helpful to share with others who do not currently receive it? Would additional information about volunteer involvement be useful to particular staff?

CAPACITY-BUILDING ACTION STEPS






Getting Started

- Educate staff about current volunteer trends, why people volunteer, and the pros and cons of volunteer involvement. Be realistic yet optimistic about the potential in your community, based on current information.
- Ensure that all volunteer recruitment materials reflect a variety of types of people — ages, sexes, ethnic groups, etc. — that you wish to involve.
- Ask a couple of “outsiders” (those not familiar with your organization) to review the current website content related to volunteer involvement. What messages are being conveyed? Is it easy to navigate? Identify specific changes to make it more effective, and then meet with the Web manager to discuss implementation.

Getting Stronger


- Adopt written value statements and policies that encourage diversity among staff and volunteers.
- Recruit a volunteer with technology expertise to assess how it could be used to increase the effectiveness and efficiency of volunteer involvement. Invite key staff and volunteers to serve as a focus group to work with this expert. Examine areas such as website visibility, electronic communication options for sharing information, recruitment strategies, record keeping, and evaluating program outcomes.
- Invite several volunteers to brainstorm ideas on how their feedback and input could be solicited and used to improve the organization.
- Create an informal opportunity for the executive director to talk with other executives about volunteer management practices in similar organizations. Learning how others are approaching these issues can spark new ideas and save mental energy and time.

Maximizing the Connection

- Gather demographic data about your community, and compare it with demographic data on your board and other volunteers. Identify underrepresented areas and develop a plan for strategic outreach to at least one new constituency. Special projects or short-term assignments may be an easy way to get started. Specific ideas for engaging several target audiences is provided on the CD .
- Identify some other organizations in your community that are wrestling with diversifying their volunteer base. Convene a roundtable or “kitchen forum” with other executives, managers, board members, etc., to share relevant information, brainstorm strategies, and explore the merits of each. A suggested process for conducting a simple community forum is provided on the CD .
- Include the volunteer resources manager or the person who knows the most about volunteer involvement in strategic planning sessions. Ask this person to provide data, program models, ideas, and/or recommendations to contribute to the process. Invite volunteers from various levels of the organization — not just the board — to provide input into planning as well.
- Develop a task force to examine how the organization learns from the experiences of its volunteers. Are regular volunteers debriefed periodically or given opportunities to discuss their involvement? Do volunteers participate in an exit interview when they leave? How are data gathered from such activities shared with others in the organization? How could this learning be increased? A sample exit interview form as well as additional feedback questions are provided on the CD .
- Examine how volunteer involvement is evaluated and measured. Plan a multifaceted analysis of the value of volunteer involvement in your organization.

Focus on differentiating between:

- The performance of the person supervising the volunteers
- The performance of other staff as they interact with and support volunteer involvement
- The impact of what volunteers do (the difference they make)
- The cost benefits of doing this work with volunteers compared to without volunteers
- The performance of individual volunteers

Each of these assessments tells part of the story, and none can stand alone as an accurate indicator of the value and results of volunteer involvement. It is also critical to distinguish between evaluating process and evaluating impact. Use the information gathered through such evaluations to create impact statements that describe long-term, sustainable changes in individuals, the organization, and the community. A basic process for impact evaluation and a simple illustration are provided on the CD .

CD TOOLS AND RESOURCES

- ✓ Engaging Various Volunteer Audiences
- ✓ Conducting a Simple Community Forum
- ✓ Sample Volunteer Exit Interview Form and Sample Feedback Questions
- ✓ Evaluating the Results of Volunteer Involvement

Moving Forward

Do not be daunted by all that is contained in the previous chapters. It is highly unlikely that any organization can undertake all of the activities suggested here—at least not in the near future! However, taking action on even a few of them will lead to positive changes in how your organization thinks and acts about volunteers. Over time, small steps translate into visible progress and significant results.

Want to talk further about this with others who will understand and can offer advice? The following organizations can be of help:

Points of Light Foundation & Volunteer Center National Network:

A national, nonpartisan, and nonprofit organization dedicated to engaging more people and resources more effectively in volunteer service to help solve serious social problems. Together with more than 360 Volunteer Centers throughout the nation and more than 1,000 nonprofit, government, and business members, the Points of Light Foundation & Volunteer Center National Network provides the leadership, knowledge, programs, and resources on a national and local scale to unify the national volunteering and service sector. The Foundation's catalog and resources can be found at their website.

www.PointsofLight.org or 202-729-8000

Corporation for National and Community Service:

A national organization that provides opportunities for Americans of all ages and backgrounds to serve their communities and country through three programs: Senior Corps, AmeriCorps, and Learn and Serve America. The Corporation is part of USA Freedom Corps, a White House initiative to foster a culture of citizenship, service, and responsibility and to help all Americans answer the President's Call to Service.

www.nationalservice.org or 202-606-5000

Association for Volunteer Administration:

The national/international professional association for individuals who mobilize and manage volunteers.

The website includes information on the profession, an extensive bibliography, the CyberVPM listserv, quotable quotes, links to related sites, database of local groups of volunteer managers, directory of consultants, calendar of events, and sources of training.

www.AVAintl.org or 804-346-2266

Nonprofit Risk Management Center:

Comprehensive source of legal information related to all aspects of nonprofits, including volunteer management. Offers practical publications and training.

www.nonprofitrisk.org or 202-785-3891

Board Source:

Numerous publications and training related to board development.

www.boardsource.org or 800-883-6262

TechSoup:

A technology website for nonprofits to learn about technology tools, donated software, new products and services, computer recycling, and how to work with technical volunteers.

www.techsoup.org or 800-659-3579 x363

PRO-VM:

Professional Volunteer Manager Discussion Group, designed for more advanced and experienced practitioners. To subscribe, send a blank e-mail to:

PRO-VM_subscribe@yahoogroups.com

OTHER PUBLICATIONS RELATED TO STRENGTHENING THE FOUR CONNECTIONS

A Guide to Investing in Volunteer Resources Management: Improve Your Philanthropic Portfolio, Association for Volunteer Administration, Points of Light Foundation, and The UPS Foundation, 2003.

Available as a free download from www.AVAintl.org or 804-672-3353.

Making the case for funders and others to support the staffing, training, and other capacities that support and sustain volunteer involvement in nonprofit organizations.

Family-Friendly Volunteering: A Guide for Agencies, Steve McCurley. Points of Light Foundation.

Available from www.PointsofLight.org/catalog or 800-272-8306.

Practical information on how to attract and involve families as volunteers.

From the Top Down: The Executive Role in Volunteer Program Success, rev.ed. Susan J. Ellis. Philadelphia: Energize, Inc., 1996.

Available from www.energizeinc.com/bookstore.html or 800-395-9800.

A practical guide to the executive-level decisions that lay the foundation for effective volunteer involvement: policies, budgeting, staffing, employee/volunteer relationships, legal issues, etc.

55 Minute Staff Training Series, Betty Stallings.

Available from www.energizeinc.com/bookstore.html or 800-395-9800.

Ten modules to help staff work with volunteers: one-hour session designs, handouts, trainer notes.

Measuring the Difference Volunteers Make: A Guide to Outcome Evaluation for Volunteer Program Managers, Minnesota Department of Human Services, 1997.

Available from www.PointsofLight.org/catalog or 800-272-8306.

A basic, practical approach to beginning a process of volunteer outcome and impact evaluation.

The Cost of a Volunteer, The Grantmakers Forum on Community and National Service, March 2003.

Available from www.gfcns.org or 510-665-6130.

An exploratory look at the costs — many of which are hidden — associated with operating a high-quality volunteer program.

The Nonprofit Leader's Guide to Building Volunteer and Organizational Capacity, Association for Volunteer Administration, 2004.

Available from www.AVAintl.org or 804-672-3353.

Information for nonprofit executives, including key elements of volunteer resources management, critical competencies, and options for supporting the volunteer function more effectively.

The Volunteer Recruitment (and Membership Development) Book, 3rd ed Susan J. Ellis. Philadelphia: Energize, Inc., 2003.

Available from www.PointsofLight.org/catalog or 800-272-8306.

A comprehensive, practical approach to recruiting all kinds of volunteers, even those you haven't involved before.

The Virtual Volunteering Guidebook: How to Apply the Principles of Real-World Volunteer Management to Online Service, Susan J. Ellis and Jayne Cravens. Impact Online: 2000. Electronic publication.

Available from:

www.energizeinc.com/download/vvguide.pdf

The definitive guide to incorporating virtual volunteers into your organization.

LIST OF RESOURCES ON THE CD

- Introduction**
- Action Plan for Strengthening Connections (DOC)
 - Identifying Solutions: Brainstorming and Creative Thinking (PDF)
 - Volunteer and Staff Reactions to Change (DOC)
- Chapter 1**
- Current Trends in Volunteering: A Summary (PDF)
 - Current Trends in Volunteering: A Reality Check (DOC)
- Chapter 2**
- The Four Connections: A Summary (PDF)
 - Organizational Self-Assessment: Planning Worksheet (DOC)
 - Organizational Self-Assessment: Instructions and Survey Form (DOC)
 - Organizational Self-Assessment: Tabulating and Analyzing the Data (DOC)
 - Survey Analysis Tool and Instructions (ACCESS)
- Chapter 3**
- Sample Organizational Chart (PDF)
 - Developing a Purpose Statement (DOC)
 - Building Commitment for the Volunteer Program: A Replicable Model (PDF)
 - Exploring Definitions and Terms (DOC)
 - Aligning Volunteer Assignments with Organizational Priorities (DOC)
 - Designing Strategic Volunteer Position Descriptions, Samples, and Suggested Format (DOC)
- Chapter 4**
- Models of Volunteer Resources Management (PDF)
 - Sample Job Descriptions for Volunteer Resources Managers (PDF)
 - Sharing the Volunteer Management Function, worksheet (DOC)
- Chapter 5**
- Sample Volunteer Agreement (PDF)
 - Sample Fact Sheet on Volunteer Involvement (PDF)
 - Examining Boundaries Between Staff and Volunteers, worksheet (DOC)
- Chapter 6**
- Engaging Various Volunteer Audiences (PDF)
 - Conducting a Simple Community Forum (DOC)
 - Sample Volunteer Exit Interview Form and Sample Feedback Questions (DOC)
 - Evaluating the Results of Volunteer Involvement (DOC)





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