

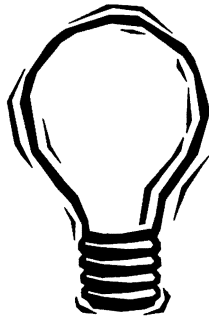
# Best Practices For Volunteer Programs



by Sue Vineyard & Steve McCurley



*Recruiting, Retaining, Recognizing, Networking, Communicating,  
Climate, Wellness, Motivation, Clout, Supervising, Training  
& so much more! The **BEST** of the Best!*



**Best Practices  
For  
Volunteer Programs**

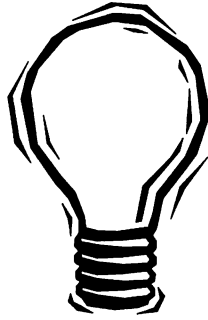
**By**

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Cover Design by Scott Hoffman

*This book is dedicated to all the incredibly creative and wonderful folks we have met along the way over the last 25 years. The ideas represented on these pages reflect their ingenuity, diligence and dogged determination to provide the best possible management, motivation and recognition to the volunteers in their programs and the clients served by their efforts.*

*They are the Best of the Best that America and Canada have to offer.*

Sue Vineyard & Steve McCurley

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# Looking into the Millennium: The Future of Volunteer Involvement

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As the new millennium begins, we thought we'd join the vast numbers of those who gaze into the crystal ball of the future and see what gazes back. You can mark what follows as a combination of summing up where we seem to be and predicting where things are going, and we can all look back in about five years to see how accurate we managed to be.

## The Current Status of Volunteering

Let's start with a look at what is going on right now.

Overall, we are in what is clearly a Golden Age for volunteering. Volunteering is more popular, more spoken about, and more a part of American society than it has ever been in our history. The past decade has witnessed a prominence for volunteering in America that is unequalled in any other country in the world, although (as you'll see below) others are making fast progress.

Consider these facts:

- A 1998 survey by the UPS Foundation found that 53% of those responding thought volunteering was more important to participate in today than five years ago. Only 10% thought it was less important. About 20% of respondents also reported that they had recently increased the amount of time they were volunteering, and 38% said they would welcome doing more volunteering. A survey by AARP reported that 60% of those not currently volunteering are at least somewhat interested in volunteering. A survey of some of the busiest Americans, those in Silicon Valley, found that more volunteers are increasing rather than decreasing their volunteer time, with 28% increasing their commitments over the past year and only 17% decreasing.
- A 1998 survey by Lutheran Brotherhood found that respondents thought that volunteering was more important than donating money by a ratio of 53% to 23%.
- A 1999 survey by TurboTax found that 34% of Americans planned to volunteer at some point during the 1999 Christmas

holiday season.

This may explain why the overall rate of volunteering reached an all-time high in 1998, with 56% of US adults engaged, an increase of 13.7% since 1995, according to the 1999 Gallup Survey on Giving and Volunteering.

## Some Continuing Trends

Some trends which have occurred during the last decade will also exert strong influence during the next ten years. These include:

### 1. *Workplace Volunteering*

The workplace is where the vast majority of American adults spend the preponderance of their time. It is the place where most people hear about opportunities for volunteering. And it is the locus around which many formal volunteer activities will be oriented, thanks to the strong growth in employee volunteer programs.

For many, the workplace has become the primary social unit, taking the place of the old service groups and clubs as a mechanism for both companionship and community involvement.

According to the 1999 Gallup Survey, 12% of those who volunteered were asked by someone at work, and 24% learned about their volunteer activity through their workplace or employer. A 1998 study by Charities@Work found that 72% of large businesses surveyed have programs to help employees find volunteer opportunities. A recent survey by the Points of Light Foundation indicates that 20% of companies with a workplace volunteer program report that more than half of their



employees participate in the program.

While workplace volunteering began in large companies, it is rapidly spreading throughout the for-profit community. It is also starting to permeate governmental employers. The federal government recently released the first report on measures taken by federal agencies to comply with an executive order to expand opportunities for volunteer involvement. Rick Lynch and Steve McCurley are working with national wildlife refuges in the Southwest region to improve their relations with surrounding communities. Among the tactics are encouraging them to develop employee volunteer teams who participate in community service projects, including sponsoring local Little League teams. Several states have recently enacted provisions for state employees to engage in release-time volunteering, especially with local schools.

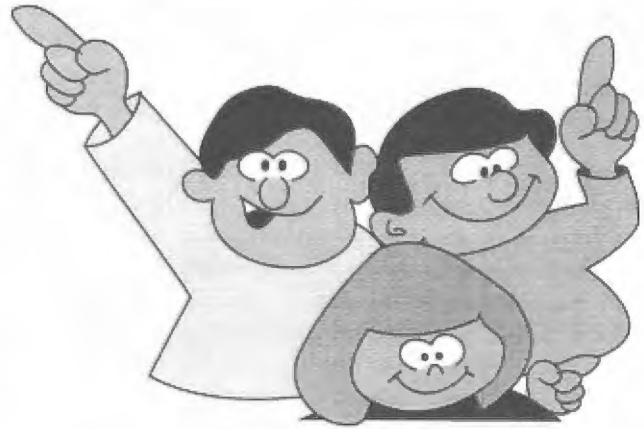
Oddly enough, the non-profit sector has lagged the most in organized efforts to encourage workplace volunteering.

## 2. Short-Term Volunteering

The day of the always-there long-term volunteer has clearly begun to pass. Today's volunteers are interested in smaller and more manageable commitments, and also want to test an organization before they become involved in significant tasks or projects. The 1999 Gallup Survey sums it up: 41% of those who volunteered did so for a sporadic or one-time activity, as opposed to 39% who wanted an on-going scheduled commitment. The average hours per week volunteered has decreased, to 3.5 in 1998, versus an average of 4.2 hours per week in 1995, the same as in 1993 and 1991.

As Susan Ellis puts it in an article in the *Wall Street Journal* (11/5/99): "The 'I'm here as long as you need me' type of volunteering is dead. People don't make commitments. They are stressed and don't want to do something that sucks time out of their lives."

Agencies will clearly need to concentrate on developing events or projects that will attract volunteers and then develop a system for cultivating the most interested and encouraging their continued involvement. This will require a greater variety of volunteer assignments with shorter time commitments and the development of a "career ladder" which can progressively lead volunteers into greater involvement. The name of the game will be retention and promotion, not recruitment.



## 3. Youth Involvement

Youth once was an uninvolved segment of the volunteer community, but that has changed dramatically in the past ten years. According to a survey by Public Allies, 72% of young people volunteer with an organized group in their community. In the past three years:

- 6% volunteered just once
- 39% several times a year
- 16% once a month
- 16% several times a month
- 22% once a week or more

According to the National Association of Secretaries of State, most youth volunteer activities take the form of social service in a one-on-one setting, such as soup kitchens, hospitals and schools. Their study suggests that "this type of volunteer work is motivated by a young person's desire to help others in a personal way."

And, according to the Close Up Foundation, "The only form of community and government involvement that students value more than voting entails service to others - 63% of high school students say that they have a great deal or a fair amount of interest in 'volunteering for charitable causes.' This is the preferred form of involvement for young women (72%)."

Interestingly enough, we are seeing strong growth at both of the extreme ends of the age segments. Youth volunteer programs are moving into elementary schools, while at the same time older seniors are increasing their involvement. According to the 1999 Gallup Survey, 43% of those 75 and older volunteered, an increase of eight percentage points since 1995. According to a study by Civic Ventures about volunteering by upcoming retirees, 33% listed volunteering as a "very

important" part of their retirement, 17% said it will be fairly important, and 25% said it will be "somewhat important." Volunteering ranks only slightly behind travel in importance.

#### 4. *Mandated Community Service*

The day of compulsory volunteering has arrived with a vengeance. What started as the alternative sentencing movement has rapidly grown and threatens to become the fastest growing producer of new "volunteers."

Consider these examples of new volunteering that doesn't quite match our image of altruistic concern for others:

- The senior citizen who is offered an income tax rebate by the town of Hartford in exchange for working a total of 50 hours for the local school system.
- The student suspended for three days from school who is given a choice between staying at home or working in a community organization in Norfolk.
- A Baltimore student who is volunteering 40 hours at a nonprofit organization to fulfill a high school graduation requirement.
- The laid-off auto worker who donates time to a local elementary school to qualify for benefits under a joint project of General Motors and the United Auto Workers.
- The person who takes a volunteer position as part of his early retirement agreement with Southern Bell Telephone.
- The traffic offender in San Francisco who is working off a fine by doing community service work for a city government agency.

Perhaps the greatest single element in this is the strong movement toward compulsory service as an educational requirement. According to a survey by the National School Boards



Association, 71% of school board members favor the concept.

#### 5. *Minority Involvement*

Volunteering is continuing to move away from a traditional, white middle-class activity.

According to the 1999 Gallup Survey, 46% of Hispanics volunteered during 1998 (an increase of six percentage points since 1995), and 47% of African-Americans volunteered (a 12% increase).

Kamilat, an organization working on issues of Muslim women, found in a survey that 44% of Muslims are willing to volunteer to effect community change.

And, in perhaps the most comprehensive survey of a population sub-sector ever conducted, the Institute for Gay and Lesbian Studies determined the following about volunteering among Gays, Lesbians, Bisexuals and Transsexuals:

- Average volunteer hours per month was 29, compared with an average of 18 for the typical US volunteer. The highest rate of volunteering was among African-Americans and Asian-Americans.
- Overall distribution of volunteer time was approximately 45% per month to GLBT organizations, 15% to HIV/AIDS organizations and 40% to non-GLBT organizations.
- "When comparing men and women with the same income and other characteristics, men volunteer almost two hours more per month and donate \$245 more than women to GLBT organizations."
- "People with lower incomes volunteer more hours than people with higher incomes." Volunteering has moved out of the mainstream and become the entire river and its tributaries.

### And Some New Trends

We'll just mention four areas:

#### 1. *Computerized Volunteering*

The computer is affecting everything else, so there is no wonder that it will increasingly impact volunteer involvement. This will happen in two major ways:

First, more and more people will use the Internet as their way to find volunteer opportu-



nities. Some of this will occur simply through visiting Web sites and examining programs and volunteer recruitment information, but more and more it will involve using the on-line brokers who have been set up to fulfill the functions that Volunteer Centers have traditionally performed at the local level. Currently, a number of organizations provide free volunteer matching via the Internet:

- SERVENet, [www.servenet.org](http://www.servenet.org)
- Community Action Network, [www.getinvolved.net](http://www.getinvolved.net)
- the Idealist, [www.idealists.org/IS/vol\\_search.html](http://www.idealists.org/IS/vol_search.html)
- Volunteer Web, [www.epicbc.com/volunteer](http://www.epicbc.com/volunteer)
- Volunteer Match, [www.volunteermatch.org](http://www.volunteermatch.org)

According to the 1999 Gallup Survey, 1% of those who volunteered in 1998 learned about volunteering via the Internet. You can expect that number to grow significantly in the next five years.

Second, more and more volunteering will happen on-line, as opposed to in-person. This "virtual volunteering" provides a convenient answer for some problems that have plagued volunteer management for some time:

- individuals with limited time availability (i.e., most people, and especially those who work)
- individuals with heavy travel schedules
- individuals in rural areas, particularly those with large geographic territories
- individuals who are home-bound through age or disability or inclination

Some cutting edge work on this area and its widespread applicability is being done at the Virtual Volunteering Project at the University of Texas ([www.serviceleader.org](http://www.serviceleader.org)), and it promises to become a substantial format for volunteering. The demographics of computer users make them an ideal volunteer recruitment target, which may explain a recent finding by AARP that those who have used a computer at work, school, or at home during the past year are more likely to volunteer.

## 2. *Recreational Volunteering*

One explanation for volunteering is that it is "serious leisure." In the coming decade, we'll see more people take that definition very seriously indeed. Note these two approaches to volunteering:

• **Vacation volunteering**  
Want to see the world and do good at the same time? Simple - take your vacation while working for a cause. You can help build homes in Central America, harvest turtle eggs in the Caribbean, excavate archeological digs in the Middle East or just about anything you want. There are even magazines devoted to advertising for these projects.



Or you can check at some options at VolunteerAmerica!, [www.volunteeramerica.com](http://www.volunteeramerica.com).

• **Migratory volunteering**  
Retired and want to see the country in a leisurely fashion? Simple - drive your RV from national wild-life refuge to national wildlife refuge and park for a few months on one of their trailer-pads while donating time. You can even set up a "migratory" pathway and follow the migrating bird or animal of your choice. And you can come back year after year after year...

While seemingly strange, these tactics simply conform to the needs and interests of the would-be volunteers, and are a novel way of dealing with time constraints and the desire to move around. With the impending population of healthy, active and wealthy baby-boomer retirees, both of these types of volunteering will blossom.

## 3. *Affinity Group Volunteering*

People used to volunteer through affinity groups such as service clubs, religious congregations and neighborhood groups. We're about to go way beyond that.

There has been a huge explosion of volunteering by fan clubs of every celebrity you can think of. One of my favorites is Sword and Staff, the Xena fan club ([www.swordandstaff.com](http://www.swordandstaff.com)). As they explain it: "Obviously our primary goal is to help others by channeling our Xena-inspired obsessiveness to charities and causes that need our talents. There very obviously is a vast desire by many fans to give something back. Sharing that experience with our fellow Xena nutballs seems like a natural progression for our maturing fandom and evolving friendships."



And, of course, there are the Goths, who, disturbed by the bad publicity they were getting after Columbine, decided to pitch in and help out the Red Cross - on a blood drive, naturally.

Add to that the X-Files fans, the Trekkies, the Elvis fans and a host of others and you've got a real movement. You can see a bewildering list of examples at [www.servicelider.org/vw/culture/fans.html](http://www.servicelider.org/vw/culture/fans.html), but it only begins to touch the surface.

Volunteering has always happened among those who felt themselves members of a group, but it is also increasing among those who would like to be a member of a group (or of something). Note the success of Single Volunteers of DC, which describes itself as "a volunteer group...with a twist." You can catch the drift from reading this paragraph from their volunteer agreement, which you must read before signing up for any volunteer project: "I also agree that SVDC holds no responsibility for the outcome of any relationship that may or may not form between myself and another person that I might meet through SVDC. In accepting a date or otherwise agreeing to meet with another member either within an SVDC-sponsored volunteer project or social, or on my own time, I take sole responsibility for any actions that might occur during that date or meeting, and agree to hold SVDC free from any liability."

#### 4. *Family Volunteering*

At some point, nonprofit organizations decided that the right way to involve volunteers was one at a time. No one is sure why this happened; some people are now trying to change the process. The most natural "unit" for volunteering may be the family.

According to a survey by AAL, half of American adults (51.4%) do volunteer work with family members "several times a year" or more frequently. Nearly one-fifth of Americans (19.5%) volunteer as a family "weekly or more often." All told, a majority of Americans (61.9%) report volunteering with family members at least occasionally. Among families with children under 12 who have never volunteered before, 65.9% said family volunteering was a good idea or were planning to do it.

A Lutheran Brotherhood survey also looked at people who volunteer together with others on projects:

- 34% had volunteered with a spouse during the last year
- 30% had volunteered with a friend
- 24% had volunteered with their children

Those most likely to volunteer with a spouse are ages 35-49, while Gen X's are more likely to volunteer with a friend or with their children. Parents overwhelmingly want their children to volunteer, with 78% saying they encourage their children to volunteer.

Encouraging children to volunteer with their parents is one of the surest ways to create a life-long value of volunteering. The 1999 Gallup survey found that among those who reported that one or both of their parents had set an example and volunteered while they were young, 69% reported volunteering as adults and 75% reported having made a charitable contribution. Statistics Canada reports that: "Early life experiences bear some relationship to the likelihood of volunteering in adult years. Compared with the volunteer rate for all Canadians (31.4%), the volunteer rate was substantially higher among people with specific life experiences during their youth: 43% for those whose parents were volunteers and 40% for those who did some kind of volunteer work. These findings demonstrate how, for many, the roots of volunteering are put down early in life and how an interest in contributing as a youth is likely to be maintained in adulthood."

Besides instilling good habits into a future generation of volunteers, family volunteering also offers the surest and quickest method for changing the demographic patterns of a volunteer organization. It could offer the best method for revitalizing organizations whose volunteer cadre is facing significant aging.

## **And A Few Management Implications**

Here a few conclusions and comments about What This All Means:

1. *Good volunteer management is becoming more important than ever.*

Along with all the demographic information cited above, we are beginning to gather concrete evidence that volunteer management actually makes a tremendous difference in successful volunteer involvement.

Probably the most thorough job of this was done by the UPS Foundation, whose survey

should be a vital part of the library of every volunteer manager.

Here are some of its key points:

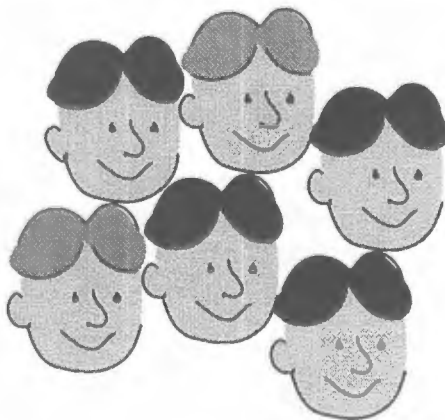
Overall, two out of five volunteers have stopped volunteering for an organization at some time because of one or more poor volunteer management practices. These include:

- charity was not well managed: 26%
- charity did not use volunteer's time well: 23%
- charity did not use volunteer's talents well: 18%
- volunteer's tasks were not well defined: 16%
- volunteers were not thanked: 9%

"Making 'better use of talents, skills or expertise' appears to be a bit less important to attracting volunteers than making good use of time. Half say that, given available time, they would volunteer more to this type of organization. People do not always volunteer for activities that use their job skills. Habitat for Humanity uses many unskilled 'carpenters.' The people who volunteer at concession stands are not necessarily using high-level expertise or talents. The expectation of efficiency is not as high for talents as it is for time."

"Poor volunteer management practices result in more lost volunteers than people losing interest because of changing personal or family needs. The best way for volunteer organizations to receive more hours of volunteer service is to be careful managers of the time already being volunteering by people of all ages and from all strata of our volunteer society."

Gary Lee, executive director of the UPS Foundation, said "Managing volunteers effectively has become increasingly important for



organizations, and has never really been addressed in a significant way."

Volunteers today are critically examining the management practices of those with whom they connect and they are not at all hesitant about abandoning those who take them for granted. The agency might not realize how valuable their time is, but the volunteers do.

2. *The most serious problem in volunteer management is badly designed volunteer positions.*

A lot of agencies talk about creative use of volunteers, but most of them are still thinking in the straitjacket of the traditional long-termer. Consider these comments from a variety of recent studies:

- **Do Something**  
29% of those who volunteer said that nonprofits did not take advantage of all they had to offer. "Fully one-half of young people who say they were given important responsibilities, compared with a fifth who say they were not, rate their experience with community organizations as excellent."

Young people would be more willing to get involved if charities made better use of their time: 29% of those who already volunteer said that nonprofit organizations did not take advantage of all they had to offer. One-half of young people who say they were given important responsibilities, compared with a fifth who say they were not, rate their experience as excellent.

Almost half (46%) of young people who say they were able to see the results of their work rated their experience as excellent, compared to only 15% of those who did not. 84% of organizations that give volunteers "a lot" or "some" input into what they actually spend their time doing keep their volunteers for two or more years on average, compared with only 50% of those that offer volunteers little or no input.

- **Statistics Canada**  
"In 1997, more Canadians volunteered than ten years earlier, but they did so for shorter periods of time. This suggests that voluntary groups may want to consider restructuring their volunteer opportunities differently. This could mean shorter, more task-oriented assignments, or, perhaps, changing the nature of the placements so as to include other family

members. Family volunteering can stretch the precious time of volunteers if tasks are designed so that the entire family can take part."

· Institute for Volunteering Research, UK  
"Flexibility is given top priority by young people, especially in respect of flexible work and working times for volunteering. The young have many pressures and demands on them and find it hard to make the time and commitment. They have a sizable number of other outlets for their free time and volunteering has to compete with this. Much of their lives are controlled by others and it is important to them to have an element of choice and spontaneity in volunteering."

"Over a half of organisations have a lower age limit on volunteers and of these organisations 40 per cent would not allow anyone under 18 to volunteer. This pattern is reflected across all types of organisations."

· League of Women Voters  
"Organizations can deal with concerns about time by allowing people to schedule activities at their convenience (90% important for an organization to do; 86% more likely to get involved), work on volunteer activities from home (82% important; 84% more likely), work for an hour or two at a time (87% important; 81% more likely), and allowing them to get out of their commitment if they need to (83% important; 76% more likely)."

If you're still looking for volunteers to fit the shapes, sizes and positions that you were ten years ago, then you have to start thinking and recruiting out of the box. And don't bother to be upset by this - sure, it means that the volunteers want to do it their way, but volunteers have always wanted to do it their way. And why not?

### 3. *We're all in this together.*

Finally, it is becoming clear that volunteer management is not something that just happens within that tiny windowless office inside the organization. It is, instead, a community of people who are increasingly sharing their hard-won information and experience, and sharing it around the world.

You can find a huge amount of sophisticated information on volunteer involvement on the Internet. Our favorite sites are:



- [www.energizeinc.com](http://www.energizeinc.com) (Susan Ellis)
- [www.e-volunteerism.com](http://www.e-volunteerism.com) (Susan Ellis and Steve McCurley)
- [www.serviceleader.org](http://www.serviceleader.org) (the Virtual Volunteering project site, but there's a lot of other stuff there as well)
- [www.cybervpm.com](http://www.cybervpm.com) (Nan Hawthorne and the CyberVPM listserv which every volunteer manager ought to belong to)
- [www.casenet.org](http://www.casenet.org) (the library for the National Court Appointed Special Advocates Association)
- [www.volunteering.org.uk](http://www.volunteering.org.uk) (the National Centre for Volunteering, UK)
- [www.charityvillage.com](http://www.charityvillage.com) (ah, those Canadians!)

You can find all the answers and even more of the opinions simply by looking around.

You can look even further than you imagine.

Volunteering is now truly international, and some of the most innovative things are being done in countries outside the US, sometimes using materials that started here. As a personal example, the book *Volunteer Management* that Rick Lynch and Steve McCurley wrote several years ago has now been translated (in total or in parts) into British English, Ukrainian, Rumanian, Portuguese, Spanish, and Chinese.

And, just in case you ever need it, here's the Polish description for Susan Ellis' *The Volunteer Recruitment Book*:

"*Prakticka a uzitocna prirucka o nabore dobrovolnikov pre pracu v tretom sektore. Obsahuje kreativne napady a lahko realizovatelne postupy pre hladanie a ziskavanie dobrovolnikov ako aj organizaciu a hodnotenie ich prace. Doplne indexom a bibliografiou.*"

At least we think it's Polish.

The upcoming Millennium promises to be a

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splendid place for those involved in volunteering, one in which the successes of the past century will continue to blossom and continue to offer satisfaction both to those who do and those who manage the good work.

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# New Competencies and Roles for Volunteer Program Managers

As we slip into the first decades of the 21st century, we find many of the very best volunteer program managers having to run hard to keep up with the changes around them. The "old ways" of doing business rarely fit the challenges that face them on a daily basis. Simply knowing the basics of good volunteer management is no longer enough, and rarely describes what they are called on to regularly do.

Well beyond the planning, organizing, staffing, supervising, evaluating and recognizing of volunteers, the very best managers have had to turn their energies toward a dozen new competencies, often scrambling to learn and apply their best practices. Each competency adds a new role to their mantle, and each has its own requirements and unique skills.

These outstanding volunteer and community service program executives spend the bulk of their time:

1. Concentrating on establishing systems that support the volunteer's work in the organization. Directors of Volunteer Services (DVS) in hospitals, for example, work with the department heads around the facility who will have volunteers in their area. They also work directly with the staff persons who will supervise the various volunteers to insure that procedures and expectations are realistic and that placement is appropriate. In short, they have become *Internal Consultants*.
2. Constantly assess needs to see where volunteers might be helpful in the workings of the organization, where they would not be appropriate and what special skills might be required. In short they have become *Needs Assessors*.
3. Keeping up to date on demographics and trends in the general population so that any necessary shifts can be made in recruiting, training and directing volunteers. They have become *Trend Watchers*.
4. Working to insure that the powers that be recognize the contributions of volunteers. They help all leadership levels, executive, Board, operations, etc., understand the invaluable role

volunteers play through their direct services, resource development and community awareness and support. These new volunteer program leaders stay highly visible, never allowing leaders to take volunteers for granted, underestimate their value or the value of the program manager herself. They blunt any steps towards reducing paid staff in the volunteer department or their role in the life of the organization. These outstanding leaders understand the importance of their role as *Protector & Champion*.

5. Keeping bottom-line figures in their head. Even if they are not number-people themselves, they have someone around them who is and teach them the facts and figures. This allows them to respond immediately to any challenge by bean-counters or frightened CEOs whose Board has told them to "cut back", so that they can quote the value of their volunteer's time investment, national figures showing that volunteers donate twice as much as non-volunteers and the correlation between giving and volunteering. Wise DVS's keep a file at the ready to document how invaluable volunteers are and what the institution might look like without them, and of course, what it would have to pay to replace these workers. Such skills make our volunteer program managers take on the role of "Financial Clarifiers." And if that were not enough, they also have to have the same expertise around legal matters, so that they can answer any challenges that may arise. We suppose this requires that they become *mini-Legal Beagles!*

6. Insuring that continual, varied and appro-



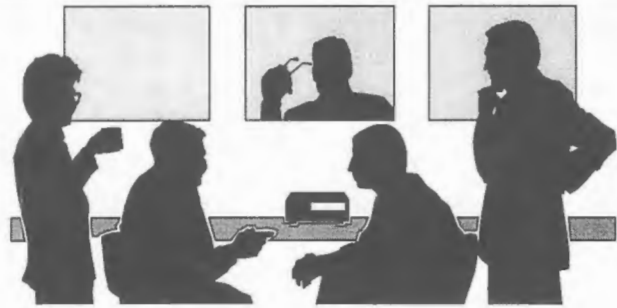
priate recognition is given to volunteers and paid staff at every level. They insure that thanks go to more than just those volunteers who have given the most hours, but also to "hit and run" folks who interact with the program on occasion, folks who speak on an effort's behalf, those who offer expertise on a one-time basis and any others who in major and minor ways make up the whole of the volunteer facet. The new leader insures that all manner of support is appreciated creatively and specifically, as they play out their role of *Cheerleader*.

7. Paying attention to the public's perception in their new role of *Market Researcher*. They keep their finger on the pulse of the community, measuring how people feel about their services, clients, volunteers, donors and administration. They make friends with key people in the media who can help project good stories and a positive image to the public, so that new volunteers might be stimulated to become involved, clients know that help is available and potential donors are aware of the good deeds being done as well as continuing needs that must be met.

8. Making sure that things are as simple as possible. Life is complex enough without systems, procedures and secret compartments of information that look like a maze! The effective volunteer program executive of the 21st century is constantly striving to simplify work, keeping her eye on the mission of volunteering in the organization. This, therefore, requires that they take on the role of *Simplifier*.

9. Working to break down barriers. They understand that change is constant and that to achieve it, they very often must eliminate old assumptions, negativity, elitist cliques, and any other barriers that prevent creative, new ways of doing business. They recognize that much of their job will not be given to talking others into saying "yes" to change, but rather, to removing reasons to say "no." In short, they must become *Change Agents*.

10. Making sure that all efforts are geared to the vision or mission of the organization. They keep their eye on that mission and make sure others are doing the same. They can instantly articulate the role volunteers play in achieving the mission. They can clearly state the vision or goal of the organization in such a way that others can "see" it too, so that everything that is being done can be measured against it. They are passionate about their role



### of Goal Tender!

11. Insuring that a healthy, productive and even inspiring climate is the backdrop for all the work being done by and through volunteers. They understand that the "feel" of the workplace is critical to recruitment and retention of workers, and that it must offer pleasure, growth and a productive use of energy to the time and energy-starved people of this new century. The strong and effective leaders of volunteer programs quickly identify and remove anyone who is inappropriate with clients, disrespectful, prejudiced, deceptive, over-bearing or in any other way, negative. They deal with difficult founding members who wish to have their way in all things, purveyors of disinformation and troublemakers who threaten clients, work or the program itself. This role of *Climate Controller* is not an easy one, but it is essential to a productive, impactful and healthy essence of any volunteer program.

12. Tending to the establishment of solid, healthy relationships and partnerships among all who interact with the program: volunteers, paid staff, board members, suppliers, clients, administrators, and others who support their efforts in any way. They recognize that relationships are a primary demand of adults in this century and therefore they focus on ways to create, support and strengthen connectedness between people and efforts. They therefore become *Bridge Builders*.

In looking at all these roles, you will note one glaring omission (or at least it might seem so at first glance): that of a direct, day-to-day, hands-on manager of volunteers. It is really not an omission, because the truly successful person who leads a large, complex and challenging volunteer component within an agency or organization must concern herself with the roles listed above rather than spending time helping volunteers stuff envelopes, deliver meals, clerk in the gift shop or counsel crisis clients.



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Her job is a larger one which must make sure that the stage is set for success of the program through broader issues of support, appreciation and continuation. It is her job to watch over the continual growth and development of volunteerism within the organization so that it is appreciated and involved in every corner of service delivery. She is in essence, a true CEO, CFO and COO all rolled into one!

Does she also have to be an expert in direct volunteer management? Of course she does, but only so she can teach others how to handle the troops in the trenches, interject herself at critical points such as volunteer orientation, interviewing for top positions, and conflict containment, etc. as needed.

The role of the volunteer manager of the 21st century has become more complex and demanding. The competencies required would be a challenge for any fortune 500 executive, yet as is typical in our field, we see the best of the best meeting these challenges with grace, determination and faith in the future.

Why, my goodness, she even keeps her sense of humor in the process. Go figure.





# The Five-Generation Mambo

## Working with Diverse Age Populations

For any of you who manage a large program and can't understand why you have feelings of schizophrenia, let me assure you that you are not crazy!

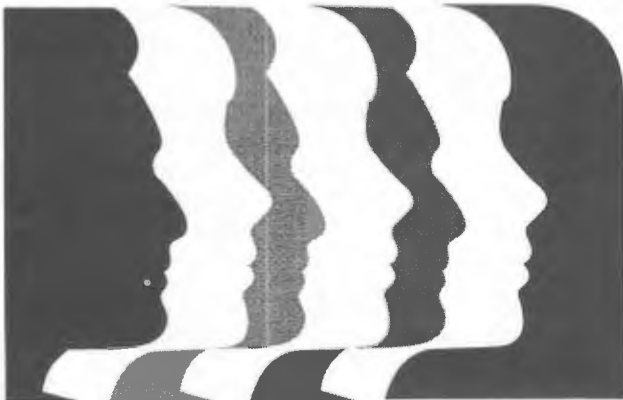
Your problem is that the circumstances of the 1990's have caused you to constantly dance around a never-before phenomenon....having to manage five generations of people as volunteers or paid staff.

As we live longer and healthier in this country and as people get involved at an earlier age, program managers are finding themselves supervising Generation X (ages 25-34), Younger Baby Boomers (35-44), Older Boomers (45-54), Mature Mid-Age (55-64) and Seniors (65 and older).

(Don't blame me for these age breakdowns; it comes from a study by McKinsey & Co. They even have a sixth category: Generation Y, of people aged 18-24!)

Each of these five generations have their own unique patterns of living, thinking and interpreting. Knowing that I risk the wrath of each generalization I share here, let me plow on with the stereotypical characteristics of each segment and attach a "present company excepted" phrase readers can use when I speak about their own or their loved ones generations!

Keep in mind that the volunteer program administrator who has volunteers and/or staff from all of these groups must constantly dance between them, understand their differing needs and expectations and mold them into teams of diverse people accomplishing shared goals!



### Seniors

Often they have been volunteering in a program for years, probably decades. They take great pride in the organization and consider it "theirs." They feel they have the perspective to know what is best for the group. Often they founded specific projects within programs and do not want anyone "tampering" with their project.

They have lived through some horror stories of failed efforts and will fight to the death to prevent anyone from trying them again! They kept their mouth shut during trying times and feel they have earned the right to lead, be heard, direct and govern. They grew up in an era when taking turns was the way to live peacefully. They have been patient and now it's their turn.

They feel personally hurt and even rejected when their ideas are not heard and acted on quickly. They often resent young whippersnappers who offer quick solutions to problems they have pondered for years. This is their program and newcomers obviously don't understand that to become a leader you need to work quietly and devotedly, on a regular, continual basis until it becomes your turn to lead.

They worry about health, safety, not out-living their resources and a dwindling supply of peers. They volunteer many hours per week on a regular basis (with the possible exception of 6 weeks during the cold winter when they go south or in the hot summer when they go north); enjoy friends and family; consider volunteering their duty and hobby; plan, cook and enjoy a sit-down dinner at night and have the bumper sticker "Ask me about my Grandkids!" on their 11-year-old Oldsmobile 98.

They want to be listened to, heeded and obeyed because they know what's best. They hate change. They have no intention of learning how to use a computer and resent voice mail. They expect that their volunteer program director will consult them on every move and do as they are told. They only say "no" when it goes against what they want.

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## **Mature middle agers**

Typically women, they watched their mothers volunteer and know how it is done. They follow the mothers-of-the-groom rule of "wear beige and keep your mouth shut!" because they are waiting their turn for leadership. They know they have paid their dues by hard work and continual devotion even when they wanted to jump out of their skin in frustration with some of the decisions made around them. They do not know how to say "no."

They are the silent generation, often squeezed between aging parents and kids that return home and need "just a little temporary help, Mom." They suffer in silence and hope they live long enough to HAVE a turn! They have been in the workplace but only after raising their children who are now scattered to the winds and eating tofu and brown rice between sessions with a guru/shrink/mentor/crone.

Women are rather well educated, having a teaching certificate (often in Home Economics), a secretarial diploma or an R.N., but are now retired and glad of it. Men have college degrees, apprenticeship certificates or trade diplomas; they worked for 35 years for one company, "brought home the bacon" and have earned every right of leisure and authority.

They worry about their grandchildren, especially how they eat and race around and wonder if they are taking enough vitamins. They try not to intrude, to always be pleasant, to avoid conflicts, to turn the other cheek even when they have none left, to be patient and to fix anything or anyone that is broken.

They know how to cook from scratch but would rather use premixed products that save time, which seems to shrink more each day, especially around holidays when they have to get all the good dishes and silver shiny-bright for at least 22 people! They drive a 4-year-old Chevy Malibu and wish they had the nerve to be impractical enough to go for that red convertible they saw on the used car lot.

They are mystified by computers but have a small one that holds their only software package which their grandchild loaded and showed them how to use. (It keeps their recipes and Christmas lists.) They have an answering machine but resent more than 2 options on voice mail they come across. They let the clock on their VCR blink until some younger person comes and resets it.

They expect to take their turn at the helm of their volunteer organization shortly and chide themselves when they become impatient to sit in the leader's chair. They hope they don't get as cranky as their older friends in the group when they are that age, but they make no promises. They expect their volunteer program leader to consult them when they have problems or need to complain about current leaders (they keep confidences but roll their eyes a lot at meetings, giving away their innermost feelings and confidences given them.)

They are always "nice."

## **Boomers**

Boomers (45-54) wanted it all and they got it! Career, working mother, house-manager, super-friend, civic-volunteer, church regular and PTA-till-you-drop!

They are used to juggling a dozen things at once including their own business which they run from their home. Time is precious and they worry that they have short-changed their kids, spouse and significant others in the area of "quality time."

Their mother gave them a lot of recipes when they were married but they only use a few twice a year because it's easier to get events catered. They worry about their kids, financial security (especially in retirement), health, safety, the environment and if they will have enough time to get everything done.

They don't know what they would do without their computer, car phone, answering machine, dishwasher, garage door opener and all-night food stores. They are tired a lot of the time, and rarely have moments for themselves. When they have time, they wonder if this is all there is to life.

They choose volunteer activities carefully, often involving themselves where they can use their special skills to do specific jobs for a cause to



which they are personally committed. They love assignments that allow them to work with friends, colleagues and loved ones. They need to see results and know they are making a difference. They want to leave a legacy and model their good neighbor behavior to their children, but worry whether their offspring have the time to even notice as they rush through life.

They expect efficiency in their volunteer programs and resent a lack of guidelines for what needs to be done. They want short-term, specific, whole work assignments. They try to be tolerant with the older folks in their program who are so opinionated but run out of patience with their "but we always" and "but we never" statements that impede progress.

They are problem solvers and expect the volunteer program manager to diagnose the root cause of difficulties and then step in to remedy them. They take their turn at leadership because they believe that everyone has to share the load eventually. They expect to be respected and heard. They do not have time to play games or put on a happy face when they are unhappy. Peace at any price is not a motto you find over their desk.

They rarely commit to long-term assignments, though they may "sign on" over and over if they feel a group is using their talents effectively. They want to have fun or great satisfaction when volunteering. They can jump from agency to agency without qualms and feel good about being able to help in many different ways during their life time. They have learned to say "no."

They want no hassles and leave abruptly when they feel demands exceed paybacks.

They drive a van for efficiency and a maroon



Mustang for fun. They are searching for their spiritual side between the heavy demands in their lives. They value relationships. They want to make a difference and worry that they are running out of time to do so.

## Younger Boomers

They want it all and are very focused on making that happen! They plan for children, take six weeks maternity leave, work via computer within a week of delivery and return to work with baby strapped into a chest pouch.

If they have a husband (most do) they expect him to be as actively involved in parenting as they; if they are a single parent they get little sleep and rarely have time for volunteering unless it is with and for their children. They juggle life's demands quite easily and carefully consider every move by how much time and energy it will take and if the results will be maximized.

They become a volunteer when they see a cause that impacts them (a school referendum, stopping a high rise in their neighborhood, etc.), things about which they are already passionate (environment, child welfare, etc.) or a wrong that needs to be righted. They tend to shy away from volunteer groups that are hide-bound in rules and regulations, militaristic or dominated by any form of "old-guard." They rarely join membership organizations.

They want short-term assignments they can do at home or in the office, or with significant others, quickly and efficiently. They say "no" easily and in fact, are asked so frequently for their help that they LOOK for a reason to say "no."

They appreciate Mom or Grandma's cooking on holidays but rarely really cook...instead they graze all day, eating from vending machines or fast-food emporiums, then stop at the super market on their way home, arranging food for the family according to what looks good at the deli or prepared-food counters.

They worry about their careers, raising children, safety, getting everything done, job security, financial stability, keeping their primary relationships healthy and staying fit. They exercise, feel guilty about not calling their parents frequently enough, and never worry about dust bunnies under the bed. They entertain lots of people once or twice a year, using many scented candles to camouflage less-than-perfect

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habitats and offering grilled chicken parts bought in bulk at Sam's Club.

They drive a red Firebird but also have a pickup or 4-wheel drive vehicle. They are in debt up to their ears and hope no one buys out their company.

When they do their rare volunteering it is through their workplace, or with friends, neighbors or family and lasts a day (cleaning up a park, serving food in a shelter, etc.)

They expect to be left alone and that they will volunteer more when time permits, "so don't bug me now!" They do not consider helping out with their children's little league, school, or field trip "volunteering," it's simply something you do as a parent. They help neighbors, friends and family when asked, but again, do not see this as volunteering.

If they do volunteer they expect the program director to tell them what is needed, train them in how to do it, have everything ready for their involvement and then leave them alone. They resent not being able to make decisions about how to do their work and anyone who stands in their way of getting the job done as they see fit. They walk off jobs when people give them a hard time, feel "rules" are to be broken if they don't make sense and believe that taking turns for leadership is nonsense if someone else is better suited.

They respect the elders in their programs as individuals but do not believe seniority gives them the right to rule. They hate tyranny in others yet expect to be heard if they feel they have a better idea and can't figure out why others don't immediately "see" their point of view.

They question the sanity of anyone who does not continually rely on a computer, Day-Timer, voice mail, car phone, Fax machine or ATM. They measure everything by time and energy expenditure. They are impatient and want results quickly.

## Generation X

They do not understand the concept of "taking your turn" and classify any explanation of it as obsolete as the horse and buggy. They often feel they have the answer and are mystified as to why some of the older folks in their volunteer setting keep telling them that they don't even understand the questions yet.



They never met a problem for which they did not have a quick fix. They fear nothing and are willing to try anything. They don't read rule books, they want to figure things out as they go. They are passionate about specific issues and tend to throw themselves head-long into efforts to address these issues.

They worry about money, career, juggling family demands, getting everything done and being #1. They believe they alone know what's best for them, others and efforts. They graze at food stands and vending machines, grab a frozen pizza at night and throw it into the oven when they are hungry, giving anyone else in the household information about what might be available and appealing in the cupboard or refrigerator. They know they have some of the recipes Mom and Grandma gave them around someplace, but can't quite recall where (probably with the cookbook their mother-in-law gave them last Christmas!).

They see everything as a small part of a global whole and therefore worry about clean air and water, landfills, strip mining, wildlife preservation, child safety seats, emissions, red food coloring and flammable clothing.

If they volunteer they do so because it impacts them directly. They expect to have a leadership role quickly and leave groups that do not offer this. They laugh at older volunteers who are attached to their uniforms with yearly service chevrons down one sleeve. They do not wear uniforms, expect written job designs, demand accountability, want constant information (preferably on the Internet) as to work that needs to be done, avoid long term assignments, and refuse titled positions (Secretary, Treasurer, etc.) because they denote rigid time frames and duties.

They expect the volunteer program leader to be

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their friend and equal, to respond to their ideas, to clear the way for them to optimize their energies and to be professional, firing volunteers that make trouble and solving problems as they arise. They say "no" more than they say "yes" and have no time for martyrs, "poor me" whiners, "but we always" old folks or anyone who stands in their way or can't "get with the program."

They are always in a hurry, are self-assured and opinionated. They have boundless energy, vast knowledge, enthusiasm, believe they can and will "do it all", know a little bit about a lot of things and are fearless in trying new ideas. They rarely wear beige, cook, straighten out, balance their checkbook, or drive their sports car or utility vehicle slowly. They are in tune with their spiritual side and often make decisions on intuition. They work hard and fast and move from effort to effort quickly.

They want everything NOW!

Wow!

And it is up to you, as a volunteer program leader to take folks from each of these five generations who in all of history have never had to be co-mingled in a work setting, and make them a cohesive team! Good Luck!

By understanding the differences you find in specific volunteers under your leadership, you can work from an informed base to mix and match different people. A person who believes she has patiently waited her turn to rule may be a miss-match with a 24 year old who wants to dominate, but a great teammate with some one 58 years old who is patient in listening and then deft in getting them to do what is best for the effort.

Never before in the history of the world have managers had to manage five generations. Even today, workplace supervisors rarely have such a challenge (most folks retire by age 65) but those who manage volunteers frequently find they must mix the diverse characteristics, expectations and assumptions of 85 year olds with 22 year olds! Each age group has its strengths and weaknesses. Individuals within each category fit some of the stereotype and not others.

As always, the effective manager must get to know the individuals being supervised, understand their perspective and blend them into

work teams that can accomplish the mission most efficiently and caringly.

On bad days it is enough to drive anyone to drinking and playing with one's lower lip. On the more frequent good days, it is a challenge to be proud of, as happy volunteers from every age category work smoothly together in their common concern for the well-being, enrichment or enhancement of others.

It's the "Five-generation Mambo" Enjoy the music.





# Case Study: The Changing World of Hospital Volunteering

During the 1950's anyone looking at volunteer involvement would have quickly realized that hospital volunteer programs were by far the largest and most successful example of organized volunteering in America. In fact, one can argue that hospital volunteer programs of that time period constituted the single most successful volunteer effort we have ever seen:

- they were pervasive throughout the health care sector
- they provided significant human and financial resources
- they involved large numbers of volunteers
- they involved volunteers who were fiercely dedicated to their service

For many women of that time, hospital volunteering was simply the thing to do, and many of them viewed their involvement with a local hospital as a natural and integral part of their lives, one which they intended to continue as long as they lived. Hospital volunteers were in fact so pervasive that one of the major stereotypes of volunteers - the "bandage roller" - comes from the hospital setting.

At the present time, however, the state of hospital volunteering is at best uncertain, and is more accurately described as precarious. This article attempts to describe some of what happened to achieve such a reversal and to outline some possible scenarios for restoring hospital volunteering to its previous glory.

## The Demographics of Hospital Volunteering

To understand what has happened in hospital volunteering it is necessary to take a quick look at the changing demographics of volunteering in the United States.

Volunteering in America is a widely-representative demographic phenomena. By that we mean that volunteering takes place across all age, ethnic and income segments. An examination of basic demographics for all types of volunteer programs reveals relatively high rates of involvement across most age categories, with a steadily accelerating decline in participation beginning about age 60. The highest rate of volunteer participation is in the age range of

35-45, but the ten-year segments immediately before and after that also enjoy substantial levels of volunteer involvement. Participation below age 20 is slightly less, although we may project that to change as more high schools establish community service programs. We can also note that the decline in participation for those from age 60 to age 70 may be due more to their not being asked to volunteer than to any lack of inclination on their part. Above age 75, however, there seems to be some reduced ability to volunteer, caused mainly by health, safety and transportation concerns.

Volunteering in hospitals, however, follows a quite different demographic curve. The demographics of hospital volunteers are quite different from this general trend toward broader involvement. Hospital volunteers tend to be significantly different from the mainstream in that they are:

- More likely to be female
- More likely to be above age 45
- More likely to be married
- Less likely to be a member of a minority group

In a very real sense, hospital volunteers are, in fact, the old stereotype of women volunteers from the 1950's. In an equally real sense, a sizable cadre of current hospital volunteers are the women volunteers of the 1950's; they have simply continued volunteering to this day, often in the same hospital where they began.

In the early 1980's, about 25% of those who



volunteered did so in hospitals; by a decade later that figure had declined by over 50%. At the current time, we seem to be experiencing a somewhat slower rate of decline, but it appears that overall participation in hospital volunteering is still dropping, primarily among hospital auxiliaries. In some hospitals the auxiliary has declined to the extent that they have ceased to exist.

Of particular significance is the heavy reliance by hospital volunteer programs on an auxiliary population which is now approaching an average of 70+ years of age, nearing the critical threshold beyond which volunteer activity becomes more difficult. Please note that I am not suggesting that volunteering beyond age 75 is impossible, just that it is more logistically complicated, particularly when the volunteering requires traveling to an organizational setting.

### A Quick Look at What Went Wrong

To understand how this disadvantageous demographic pattern developed, it is necessary to go back about fifty years, to the Golden Age of Hospital Volunteering. During the 1950s hospital volunteering was, indeed, the thing to do. A large number of housewives became hospital volunteers, many of them in their early twenties. They were joined by women in their thirties, forties, fifties and above.

How did volunteering in hospitals get from that Golden Age to its current difficulties?

The explanation for this is a simple one, based mainly on the extremely high retention rates among hospital volunteers who were recruited during the 1950s. These volunteers arrived in hospitals in significant numbers, developing an incredible depth of relationship and involvement with their institutions, and then proceeded to continue volunteering in large numbers.

While this last statement may seem like a highly desirable consequence, it is, paradoxically enough, what has led to the current dreadful state of affairs.

Hospital volunteer programs of the 1950s were faced with the intriguing situation of having an abundant supply of eager and competent volunteers. And these were not the "short-term" volunteers of today who force agencies to constantly engage in recruitment - these were committed volunteers with no intention of ever "deserting" their hospital.



Hospital volunteers programs had a more than adequate supply of volunteers to accomplish most of their aims. And, in addition, when they did engage in recruitment they were able to rely on the enthusiasm of their current volunteers as an effective persuasive tool. Current volunteers would simply talk to their friends about volunteering for the hospital and through word-of-mouth a replacement supply of volunteers was brought into the system.

There was only one small problem with this process, one which has taken decades to unfold.

When the housewife of the 1950s, aged 30, talked to her friends about volunteering, it was quite likely that her friends were around the same age as she. When that same housewife recruited her friends during the 1960s they were then in their forties. And in the 1980s they were in their fifties. And now they are in their sixties. This effect in recruitment is commonly referred to as "cloning" and it besets any group which only relies on word-of-mouth recruitment. There is a natural tendency to increasing homogeneity in the volunteer population, due to the equally natural tendency for people to have friends and acquaintances of similar backgrounds and characteristics to themselves.

The situation worsened steadily as the original volunteer population aged and as no replacement group was brought into the system at the youngest levels. The non-replacement factor has been exacerbated by other societal factors, including the entry of large numbers of women into the workforce and an increasing availability of volunteer opportunities other than in health care. If you project current figures of the current state of hospital volunteering forward into the next decade you have a situation



which approaches critical, if not fatal.

You can see the consequences of the trend by examining the results of the Gallup Surveys on volunteering during the past decades. In 1981, the percentage of volunteers who reported that they were involved in health care was 23%, roughly one of every four volunteers in this country. By 1985, that percentage had dropped to 19%, and by 1989 to 12%, roughly a 50% decline in ten years. Much of that was simply the natural decline in auxiliary volunteers due to aging.

### **Who Should We Blame for All This?**

It is important to note that this situation developed without anyone doing anything "wrong." This was not the fault of the Directors of Volunteer Services, who were all running programs which "looked" totally successful. It was not the fault of the auxiliaries, who were engaged in being productive on behalf of the hospital and could take great pride in their success.

The best explanation for this phenomenon was expressed by Peter Drucker, who once noted "Those whom the gods would destroy, they first give twenty years of total success."

In essence, the destruction of hospital volunteering came about because the system was so successful that it never had to stop and examine the long term consequences of what was happening. The incredible motivation of the hospital volunteer population created a cadre of volunteers who kept volunteering, thus guaranteeing that at any single year in which one examined the system it would appear successful. If the hospital field had been having more problems with volunteer involvement it might have caused someone to look at longer

term trends, but in the face of such success no one bothered.

It is also important to note that other organizations are facing a similar problem. Many of the membership organizations which began to flourish during the post-WWII era are the victims of similar demographic patterns, including service groups such as Kiwanis, and arts groups, such as symphony guilds. Nursing homes are facing a similar situation.

And many traditional social service volunteer programs faced a similar problem back in the early 1970s, coming at an earlier point than the current crisis in hospital volunteering. It came sooner for them because they had a smaller and less dedicated cadre of volunteers and thus "hit the wall" faster.

### **What to Do About The Whole Lamentable Situation**

Solving a problem which has developed over decades is always more difficult than one would wish. The demographic imbalance was relatively small at first, and could have been easily corrected. Now that it has become more extreme, the solutions are accordingly more problematic.

#### **Prospects for Revitalizing Auxiliaries**

There are three factors which favor an attempt to revitalize auxiliary structures:

1. *Increasing significance of health care*  
Health care is a highly significant subject area, affecting virtually every person and every community. It is, to put it simply, a life and death issue which does not need to be explained or justified. The aging population of the US is increasingly involved on a personal level with health care and hospitals. Baby boomers are dealing with hospitals both in terms of aging parents and in terms of their own aging. It is clear that in the next two decades health care will become one of the most significant areas of social service in our country, with a direct relevance to everyone. The successful operation of hospitals will be a key part of health care systems. This means that in competing for people's attention and interest health care will enjoy a competitive advantage because good health and good hospitals will be a personal issue for most members of the community. For many in the community, health care will be the issue of concern, and it is always easier to recruit volunteers who have a personal concern for a



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program area.

## 2. *Teen/senior linkages*

Hospitals have always been in the forefront of involving teenage volunteers, and this history may become advantageous in revitalizing auxiliary structures. One potential target population for auxiliaries is the vast numbers of teenagers who will be volunteering in the decades to come. Some auxiliaries will take advantage of this by creating "youth" auxiliaries or by utilizing the affinity for teen/senior linkages that has been seen to be so effective a volunteering partnership. Newly recruited teens can then also serve to involve their own grandparents in the auxiliary, creating a synergistic relationship.

## 3. *The Senior Boom*

Some auxiliaries may choose not to attempt to change their demographics by recruiting younger volunteers but will instead simply capitalize on the Senior Boom which is now beginning. They will concentrate recruitment efforts on the newly retired, and may well be able to develop a viable volunteer structure which concentrates on the 60-75 age range. The demographics of retiring Baby Boomers could easily sustain auxiliary structures for the next 25 years if they are successful in tapping into this population.

## **Barriers to Auxiliary Revitalization**

There are a number of very real barriers to revitalizing the auxiliary structure:

1. The same decline which has beset auxiliaries has also been experienced by other clubs and volunteer societies. We seem to be in an era in which there is opposition to joining formal groups. Volunteers now want easy, short-term volunteer experiences, not long-term group membership. Volunteers want to do work that has demonstrated impact on clients, not work on organizing committees that revise bylaws. The current complex structure of auxiliaries may be too cumbersome to be appealing to those who wish streamlined volunteering. Even those who are seeking longer volunteer commitments are not necessarily choosing to become "members" of organizations, with the additional responsibility for maintenance of a system which this entails. Auxiliary structures will not just have to market the concepts of health care and of volunteering, they will also have to demonstrate why becoming a member of an organized volunteer group conveys additional benefits.

2. Changing the auxiliary system to be less complicated is theoretically easy, but faces a high risk of opposition from current auxiliaries to change. After all, current auxiliaries know that the system has worked for the past 30 years, so the rationale for change seems a bit obscure to them. Those auxiliaries who didn't like the system left long ago, so the current ones are very likely to be those who are comfortable with and successful in the old system. It's difficult to change when you have every reason to like and value the system in which you have been so comfortable for so long.

3. The overall confusion within the health care system will make it difficult to focus the efforts and relationships of auxiliaries. At the current time, most hospitals do not know what their own future is, much less how an auxiliary will relate to that future. This confusion will make it very difficult to get the support of hospital administration either for changing the structure and operations of auxiliaries or for identifying significant ways in which the auxiliary can contribute to providing better health care.

4. Like it or not, most hospital auxiliaries have the "image" of being organizations run by and for senior females, and this image is absolutely accurate. Attending a meeting of auxiliaries is somewhat like attending a convention of clones. It will be very difficult to convince individuals whose image does not fit this image to "join" a group to which they so clearly do not "fit." Hospitals will need a strong combination of mass media advertising and involvement of representative "gatekeepers" to new populations to overcome this negative image.

5. Last, and by no means least, revitalization will be difficult because there is no organized local, state or national effort to induce or assist auxiliaries to change. Each auxiliary is left to its own impulses, imagination and devices.

## **Prospects for Expanding In-Service Programs**

Beginning about twenty years ago, some hospitals began creating in-service programs, many of which are not linked to the auxiliary structure. These programs have not been experiencing the same precipitous decline as auxiliary structures, although they have also not been exactly flourishing in many hospitals. In many ways, however, these in-service programs present an excellent avenue for involving community members as volunteers. There are three factors which favor the expan-

sion of in-service volunteer programs:

1. *Significance of health care*

The same interest in health care which favors auxiliaries also favors in-service programs.

2. *Scope of potential volunteer positions*

Hospitals, as large institutions, are potentially one of the most competitive volunteer structures in that they have the capacity for creating a wide range of volunteer positions, covering every conceivable variety of volunteer work. Literally every variety of volunteer position can be replicated in the hospital setting, ranging from direct work with clients to research to activities in the community. There is literally no type of volunteer work that cannot be done in a hospital setting. Potentially, hospital volunteer opportunities can be developed around jobs which involve direct person-to-person contact, research, leadership and decision-making, physical labor and every-thing in between. The sheer size and complexity of a hospital's operation make it a potential goldmine for development of volunteer jobs. When you also develop volunteer positions around community outreach you begin to realize that the potential for creative volunteer job development is unlimited.

3. *Scope of logistical alternatives for volunteers*

Hospitals are institutions which are open seven days a week, 24 hours a day. They are structured to be conveniently available in whatever timeframe the volunteer has to contribute. Unlike smaller institutions with limited capacities, hospitals have the scope and complexity to handle short-term, one-shot, or ongoing volunteer activities.

Based on the above factors, our bottom line for the prospect of expanding in-service programs is quite simple: "Hospital in-service volunteer programs are potentially the most competitive volunteer structure that exists. They can compete with any other cause and with any other organizational structure on at least an equal basis and most often with significant advantage."

**Barriers to Expanding In-Service Programs**

There are five potential barriers to expanding in-service programs:

1. *Negative image of health care and hospitals*  
Most Americans do not "like" providers of



health care. This is partially because people usually connect with these institutions in time of personal or family trouble, but it is also because most health care providers have not acted in any likable manner. As providers are viewed as interested only in making money, it will become difficult to attract community interest in working on behalf of the institution. This phenomenon has already hampered many of the for-profit hospitals, who have watched declines in their volunteers as scandals became public regarding financial gouging. People generally do not choose to volunteer for institutions whose good intentions they do not trust. Hospital volunteer programs will benefit or suffer as the image of hospitals changes. The increasingly negative image of large health care institutions may make recruitment more difficult. Unlike auxiliaries, which can recruit using their own image as a "volunteer group," hospital volunteer programs are intimately tied to the image of the hospital. As the image of health care becomes one of a system oriented only toward profit and financial gain, volunteer programs will have difficulty appealing to altruistic impulses.

2. *"Rule-driven" nature of hospitals*

Health care is currently a structure which operates in a complex and seemingly never-ending administrative maze. Hospitals are not creative as much as they are protective and reactive. The newly-enacted JCAHO standards for hospital volunteer programs are an excellent example of good intentions run amok. Rather than guaranteeing quality they are stifling innovation. The current "rule-driven" nature of hospitals may make it difficult for volunteer directors to be creative in their involvement of volunteers and will make it difficult to convince volunteers to work under systems which look more concerned with paperwork rather than results. Hospitals are currently our most-afflicted institutions, with systems that depress many of those who work there. Unfortunately, most

volunteers prefer not to work in depressing environments

### 3. *Lack of staff support*

The biggest difficulty in developing exciting roles for volunteers in hospitals is the lack of staff support. This "opposition" is not, in all probability, actually directed at volunteers; instead, disheartened hospital staff are generally unhappy and unwilling to make any changes, to take risks, or to do additional work. Hospitals have become depressing and unrewarding environments for those who work in them, and have become organizational climates in which distrust of others is pervasive. In an atmosphere like this, staff become protective and uncooperative, and resisting volunteer involvement is simply one symptom of a larger phenomenon. Involvement of volunteers can only be successful with the active and enthusiastic cooperation of hospital staff at all levels. Staff must both seek and allow a partnership with volunteers that strengthens the bonds with the hospital and the work that it is doing. Many hospital staff, however, are uncertain about their own futures and dissatisfied with those who are operating their hospitals. This produces unfortunate results: "staff will tend to treat volunteers the way that management treats staff." If staff view volunteers as just another part of their problems rather than as a part of the solution then efforts to expand volunteering will fail

### 4. *Splintering of DVS role*

The DVS is the key to initiating change, but this effort will take time. Unfortunately, most DVS's are now part-time, often with little administrative support, and very often in charge of multiple project areas, each of which would rationally require a full-time manager. One consequence of the competence of most DVS's has been a tendency in hospital administration to assume they were capable of regular miracles, so every new project which involved the community ended up in the volunteer department. Unfortunately, orchestrating change takes time and resources. This, however, requires both the authority to make decisions and the time to work with others. Neither of these is readily available in most hospitals. If anything, the position of DVS is growing increasingly fragmented, with additional job responsibilities being added with reckless abandon. It is difficult to operate a good volunteer program in your spare time; it is impossible to create a new and even better one.

5. No organized local, state or national effort. As with auxiliaries, it is every program for itself.

## What To Do To Make This Work

The following will be required to make this work for either auxiliaries or in-service programs, preferably operating together:

### 1. *Create a Climate for Change*

Hospital volunteer programs need to pro-actively decide that they are responsible for their own future, if they are to have one. That will mean developing processes to identify significant linkages to the mission of their hospitals, so that both administration and staff can recognize the potential contribution that volunteers can make. It will mean creating bold new volunteer jobs that seize the attention of prospective volunteers and gain the respect of staff. It will mean being willing to change all old systems and operations, adopting ten new types of volunteer initiatives instead of one.

### 2. *Collaborate with Everybody*

First, hospitals need to learn to work together, exchanging information about what works and how to make change happen. We don't have the time to re-invent all the wheels on an individual basis. We need to share with and steal from each other. We need to realize that hospital volunteer programs, even in the same community, are not competitive - we will all gain from the success of any of us. Second, hospitals need allies from the outside world. Causes such as America's Promise, which lists health care as one of its five main concerns, are good prospects for partnerships. Businesses should be adopting hospitals as they are adopting schools. And schools should become partners with hospitals in implementing their com-



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munity service requirements. Hospitals cannot and should not attempt to stand alone.

### 3. Campaign

There are currently national campaigns to recruit volunteers for education, Big Brothers, CASA and dozens of other causes. There is no national, no state and practically no local campaign to recruit volunteers for hospitals. This is insane. Health care desperately needs a national volunteer recruitment campaign targeted at teens, corporate employees, families, and the newly retired, one which will also serve to change the moribund image of hospital volunteering. This campaign could be initiated by AHA and ASDVS, by comparable state organizations, by some of the large hospital chains, by one of the foundations interested in promoting health care, or (even better) by a coalition of all of these groups. This effort is too large to be sustainable by a single hospital and too valuable to be left to chance.

### Summing It All Up

We stand on the cusp of the future of hospital volunteering, an area of volunteer activity which has epitomized all that is valuable and interesting about volunteer involvement. At the moment this future does not look bright. In fact, I'll make the following prediction:

*"In the absence of a concerted national effort to reverse current trends, hospital volunteering will become irrelevant in the next 15 years."*

What a waste that would be.

And the greatest waste is that this bleak future does not have to occur. The same factors which lead to the paramount status of hospital volunteering can now serve to spark its resurgence, guaranteeing us another five decades of success. Let us wish this is so, since health care is far too important a subject to be left to doctors and administrators.

### Further Reading

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# Working with Staff to Develop High-Impact Volunteer Assignments

Developing high impact volunteer assignments is the most effective method of upgrading the involvement of volunteers. The work done by volunteers is the essential currency of volunteer involvement, giving value both to the volunteer and to the organization. Directors of volunteer service must work continually with staff to ensure that requests for volunteer assistance are channeled to areas that are significant and meaningful, offering volunteers a chance to make a real difference in the agency. As every volunteer director has learned, however, this is not just a matter of asking staff what volunteer positions they would like filled. Most staff have neither the knowledge nor the energy to develop interesting volunteer positions, and some will resist involving volunteers in serious work. Here are three ways to work effectively with staff to develop high impact volunteer jobs.

## Link Volunteer Jobs Directly to the Agency Mission

If you can link volunteer jobs to the accomplishment of the agency's mission, and avoid having volunteers working in peripheral areas ("nice, but not essential"), then you can better guarantee that volunteers will be spending their time on meaningful activities.

Gail Moore and Marilyn MacKenzie noted this vital need:

*If directors of volunteers want to establish credibility they must demonstrate a commitment to helping the organization (and the people that direct it - the executive director and the board) meet its objectives and achieve its mission.*

To determine where within your agency volunteers can be linked to accomplishment of the mission, ask the following questions:

1. Where do we have the greatest difficulty in delivering effective services?
2. What are the biggest unmet needs of our clients?
3. Where do we have problems in reaching new populations?
4. Where are staff spending their time on work beneath their skills and capabilities?

The best time to ask these questions is either during the strategic planning process for the agency or during the initial planning phase of a new project. Each of the questions above will give you answers that could be turned into volunteer positions.

Ultimately it is desirable to have the role of volunteers directly linked to accomplishment of the agency's mission, preferably in a written statement which outlines the involvement of volunteers. Consider this example from the Volunteer Program of the Bureau of Land Management:

*In the decades to come, volunteers will be woven into the fabric of BLM, playing a key role in protecting the health of the public lands and providing better service to our publics. Volunteers will be vital stewards of the public lands by serving as BLM team members, providing innovative ideas and key resources, and serving as ambassadors in their local communities.*

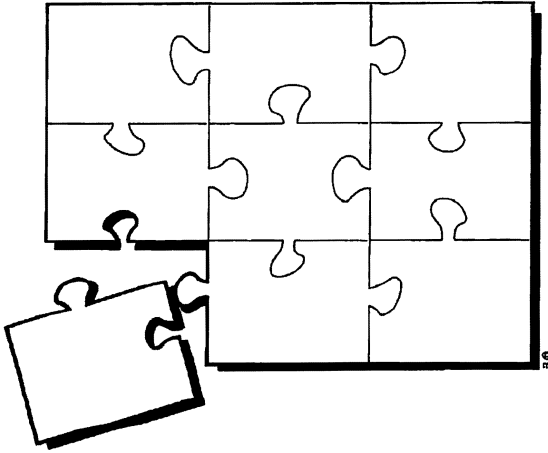
## Link Volunteer Jobs Directly to Assisting Staff

Staff will value volunteer positions which they see to be of direct assistance to them.

Unfortunately, you, as the volunteer director, are not in a position to determine what these jobs might be. To uncover possible volunteer jobs you will need to conduct interviews with staff to determine their needs and interests.

This role basically engages the volunteer director as a consultant to staff, much as computer specialists seek to specifically match applicable





software and hardware to computer users.

To successfully undertake this, you will need to ask the right questions, and to ask them in the right fashion. Here are some examples of different question types that a good interviewer might use in working with staff to develop opportunities for volunteers:

#### *Factual Questions*

Factual Questions are designed to obtain objective data about the other party and their work. They are intended to give you a picture of the status of the other party, and are usually best phrased in a manner which will allow them to be answered with short, unequivocal responses.

Examples include:

- "Do you do any volunteer work yourself?"
- "Have you ever worked with volunteers in the past?"
- "Are you utilizing any volunteers in your department now?"
- "How many volunteers are here now?"
- "How long have they been with you?"
- "What sort of jobs do these volunteers do?"
- "What are the major services that you deliver?"
- "What do you see as the biggest needs in your area?"
- "What kind of training should a person have to do this type of work?"
- "What resources or assistance would you need to involve volunteers in your area?"

#### *Feeling Questions*

Feeling Questions are designed to obtain subjective data on the other party's feelings, values and beliefs regarding the situation. They are intended to give you information on how the other party thinks or feels about the situation. Feeling Questions are most useful when used to follow-up a Factual Question. Examples include:

- "How did you feel about working with volunteers then?"
- "What do you think it would take for a volunteer to enjoy working here?"
- "What do you like to do most in your job?"
- "What do you like to do least in your job?"
- Is it possible that volunteers could do some of the things you're working on if they were under your supervision?"
- "Are there jobs that you do not think it is appropriate for volunteers to do?"
- "Do you think you could train volunteers to do the job adequately?"

#### *Third Party Questions*

Third Party Questions are an indirect way to discover what the other party is thinking. They are useful because they seem less threatening than a forced direct request or question.

Examples include:

- "Some people would use volunteers to do \_\_\_\_\_. How would you feel about that."
- "One thing that other departments have tried is to \_\_\_\_\_. What would you think about that?"
- "A problem that other people sometimes have is \_\_\_\_\_. Do you think that might occur here?"
- "Has anyone else expressed any concerns about what volunteers might be doing here?"

#### *Checking Questions*

Checking Questions allow you to see how the other party feels as the discussion progresses. They also allow the other party involvement and participation in the decision-making process. Examples include:

- "How does this idea seem to you?"
- "What would happen if we did this \_\_\_\_\_?"
- "What would make this a negative experience for you?"

This process of direct interviewing of staff should be familiar to most volunteer directors, since it is precisely the kind of thing that is done in interviewing prospective volunteers about their interests and abilities. You can also extend this process by advertising interesting talents that prospective volunteers have shown, thus allowing staff to "recognize" a potential volunteer job. Publicizing of success stories is another way to encourage creativity among staff, as is periodically distributing a listing of all



the types of work that volunteers are engaged in within your agency.

## Link Volunteer Positions to Wishes and Dreams

Another way to approach the development of new volunteer positions is to allow staff to dream about what they would like to do to really enhance their work. Assisting in this can be done either during direct interviewing of staff or during a planning session. It basically involves prompting staff to think about the ways they can both improve themselves and the quality of the work they are doing. The way to do this is to ask what is called a *Magic Wand Question*, one that allows the respondent to do a bit of daydreaming and wishful thinking.

Examples of good questions to ask to stimulate this process include:

- "What have you always wanted to do but never had enough staff?"
- "What would it be like here if you didn't have this problem or concern?"
- "What would you do if you had a full-time person assigned as your assistant?"
- "If you could design the perfect person for you to work with, what would they be like?"
- "What more would you have to do to be truly recognized for giving excellent service to your clients?"
- "What have you wanted to learn how to do better?"
- "What are some things that you would like to see done but that you never have the time to do?"

The goal of these questions is to tap into the frustrated creativity of overworked staff. This technique is also very useful in situations where staff may fear replacement of paid positions by

volunteers, since it concentrates on developing new areas of activity, not re-assigning current work.

Each of the techniques above should assist you in increasing the "value" of your volunteers to the agency, resulting in the creation of positions that achieve a higher impact for the agency and more meaningful work for the volunteers.



# Fishing for Volunteers: Using Short-Term Jobs to Catch Long-Term Volunteers

Recruiting volunteers for a short-term event is a relatively commonplace and relatively easy practice these days. On practically any given weekend there are a variety of available volunteer activities which basically require the commitment of a few hours often spent with friends, ranging from building houses to cleaning up parks to the various "a-thons" that permeate the landscape. There are even volunteer organizations that specialize in organizing these activities and targeting recruitment to those interested in short-term volunteering.

The only problem, of course, is that operating a sustained volunteer effort off of these one-shot events is a difficult, if not impossible, task. Most organizations need volunteers who are actively involved on more than a once-a-year basis, and who are willing to come back once the fun event is over and do the hard work that really needs to be done. In particular, they need volunteers who are willing to accept responsibility and perform leadership functions.

Here are some tips for approaching this situation. We'll warn you up front that they require a planned and organized effort, and that you'll have to invest a lot of work before you earn your reward, but we think you'll find it well worth your time. Ours is a three-step process to landing the volunteers that you really need, not just the ones who show up to get the free T-shirt.



## Step One Organize Attractor Events

An attractor event is designed to engage the attentions and short-term involvement of larger numbers of volunteers. It can be organized around a clean-up (park, home, non-profit agency),

around community education (a mall show or a corporate fair), an "a-thon" fundraiser, or any other activity which meets the following requirements:

- it can involve large numbers of people in a variety of volunteer tasks and projects
- the volunteer jobs don't require any substantial training or preparation
- the work is fun and exciting and allows people to work with others
- the activity is photogenic, thus attracting media attention

The event itself should also accomplish something worthwhile, although this isn't our primary aim. In addition, the event should allow all those who participate (volunteers and the general public) to get an introduction to the cause, clientele and operation of your agency, with a particular highlighting of the contributions made by volunteers to the work of the organization. This introduction can be provided via print, demonstrations, or whatever media seems to work in your setting. The key is that current volunteers should be a prominent part of the event.

## Step Two Scouting Process

During the event current volunteers should be assigned to work with groups of newcomers. Part of their assignment is to manage the work to be done during the event, but another part of their assignment involves "scouting" those who are attending, looking for those who show the most interest and potential.

These scouts should be encouraged to do the following:

- establish personal contact with each of the volunteers with whom they are working
- give the newcomers a sense of "welcome" and appreciation
- get the names and addresses of those attending, so that they can be thanked afterwards
- ensure that each new volunteer gets some basic information about the agency and about its involvement of volunteers

Particular elements to look for in volunteers with a potential for further development are:

- people having a lot of fun
- people who seem to like organizing others
- people who indicate interest in the cause
- people who seem to have some personal connection to the cause

Particular attention should be paid to locating those who are "in charge" of already-established groups of volunteers, since these are likely to be personality types who enjoy being leaders and doing additional work.

Scouts should make notes about those they think have the potential for development and a debriefing should be held following the event. The debriefing should discuss who might be receptive to further involvement, what types of volunteer work they have shown interest in, and how they will best be drawn further into the organization.

### Step Three Nurturing Process

The process of cultivating those whose potential has been identified will vary depending upon your circumstances, but here are some possible avenues to explore:

1. If the event is a recurring one, you can increase involvement by offering additional work within the context of the event. This might include asking them to provide feedback about the event, offering them a promotion within the activity or group with whom they served in the past year, or asking them to participate in helping organize and operate the event. This invitation should be offered by the scouting volunteer who has developed a personal relationship and it should be based on being impressed with the quality of the work done by the potential volunteer.
2. The volunteer should receive some sign of promotion with the agency, such as an official title which indicates their new status, access to materials or equipment, a business card or some other items which create an official link with the organization.
3. While the volunteer is doing additional work on the event they should receive a further indoctrination about the agency and its work. This should include both information about the work of the agency and about the variety of volunteer positions that are available within it.



It greatly helps, by the way, to have a wide variety of volunteer jobs available, since offering options increases your chance of resonating with the potential volunteer.

4. The types of volunteer work available should represent an ascending scale of complexity and requirements. It should include short and easy work, and then have a staircase of more difficult positions. The volunteer should be exposed to current volunteers in these positions, who are given an opportunity to talk about their work and why they enjoy it. These discussions will serve as a low-pressure recruitment effort. From time to time these current volunteers can increase the pressure by asking the potential volunteer to "help them out" on something they are working on. This work should be something that will give the potential volunteer exposure to what the volunteers are doing without requiring a big commitment.

5. The potential volunteer should also be introduced to staff and volunteers at the agency, and encouraged to get to know them. Becoming friends with others in the organization can serve as an anchor which holds the connection of the volunteer to the agency.

6. While this exposure process is occurring, further scouting of the interests and reactions of the potential volunteer should be undertaken. This scouting should fine-tune the effort to discover the type of motivations and possible volunteer position that can be most appealing to the potential volunteer.

### Potential Dangers

As in any process, there are some easy mistakes to make. Here are some things to avoid:

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- Getting too greedy, too fast. Offering the volunteer more than they seem to want to do can be a fatal mistake. The trick, as in fishing, is to make the volunteer want to take the bait, not to force it upon him. Remember, that unlike fishing, the volunteer can always get off the hook.
  - Relying on make-work jobs. The early steps of this process can only succeed if the initial jobs offered to the volunteer are short-term and productive. If a volunteer thinks at any stage that their time is being wasted, you've lost the battle. All of the jobs on the "career ladder" must be meaningful ones and the volunteer must be able to stop at any point in the process and feel good about the work they are doing.
  - Having an opportunity for true advancement. The implicit offer in this process is that the volunteer can become a real leader in your organization. This is, of course, only true if your organization has upward mobility for volunteers and if the current leaders are willing to step aside as new talent emerges. If your current volunteer structure is petrified, it will be very difficult to get new blood into the system.



# Meeting the Challenges and Opportunities of Mandated Volunteering

During the period of 1975 to 1995, the defining change in volunteer involvement was the shift in styles of volunteering from the Long Term Volunteers, who had dominated volunteering in this century, to the Short Term Volunteers, who struggled to balance the demands of work and competing organizational demands with community involvement.

Each of these styles of volunteering created slightly different approaches to volunteer participation. Overall, the shift from the Long Term Volunteer who typically stayed with an agency for a long period of time to the Short Term Volunteer who typically serves for shorter periods has been accompanied by an increased need for good volunteer management, with greater demands on the agency for accommodating the needs of the newer type of volunteers.

The defining change of the next decade in volunteer involvement will likely be the predominant growth of what might be called the "Mandated Volunteer," the individual whose entrance into volunteering is at no choice of their own, but is instead dictated by some outside agency

Examples of Mandated Volunteers include:

- high school community service students
- welfare recipients seeking to maintain benefits

- alternative sentencing program participants
- public housing inhabitants
- individuals performing community service as an alternative payment system for local taxes, fees, or fines.

If present trends continue, it is not unlikely that almost every governmental benefit program could be accompanied by some compulsory requirement for community service. The imminent result of this will be the mass infusion into volunteering of populations who have little or no experience with volunteering as we had become accustomed to thinking about it.

The purpose of this article is to make some preliminary observations about what the impact of these new populations will be on volunteer involvement.

Here are our predictions:

## Changes in the Design of Volunteer Jobs

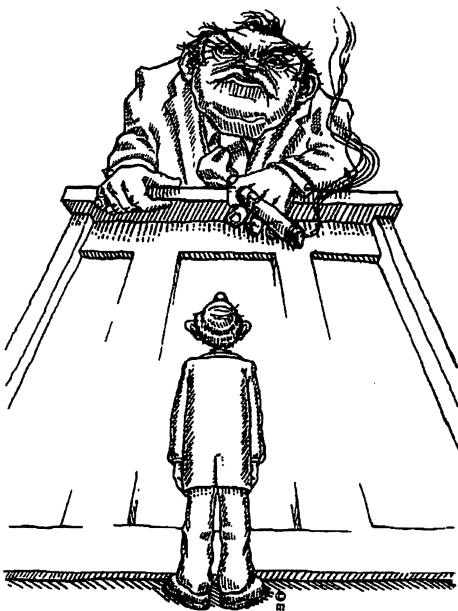
The design of volunteer jobs for inexperienced volunteers who will only be with an agency for a relatively short or small period of time will require two changes. The first will be an increase in the number of "low level" volunteer jobs suitable for those with little work experience, minimal skills, and little time for extensive training. These jobs will be hard to make either interesting or rewarding.

The second change will be an increased need for and reliance upon jobs that are either shaped around projects or events, i.e., jobs that multiple volunteers can work on together and which have definite and short time frames.

The good news in all of this is that the new volunteers will alleviate one of the problem situations in volunteer job design of recent years – the difficulty in obtaining volunteers for those jobs which had to be done Monday through Friday from 9:00am to 5:00pm.

## Changes in Volunteer Recruitment

Those agencies which can successfully involve the new Mandated Volunteers may totally elim-



inate any recruitment problems - there are likely to be far more new volunteers than there are agencies capable of making use of them.

There will be, however, two major changes in recruiting efforts. The first will be an increased need for targeted recruitment of volunteers for "skilled" positions (board, technical work, etc.) and for positions that require longer time commitments (mentoring, for example).

The second will be the development of what might be called "second tier" recruitment strategies, focusing on recruitment through retention and reinvolvement of Mandated Volunteers who have served their compulsory time and are being sought to re-volunteer with the agency of their own volition. This strategy will require great care on the part of the agency, since it can only be done if the agency invests resources and time in building commitment among new volunteers. Clearly, those programs with good volunteer management practices are most likely to be successful.

### **Changes in Screening and Matching**

Current volunteer matching practices involve learning the skills and interests of volunteers and then matching them to suitable jobs. This will become much more difficult with the new volunteers for the simple reason that many of them lack the work and life experience to know what type of job they might be either interested in or capable of. This means that interviewing of the new volunteers must expand to contain some sort of basic skills assessment process as well as an inventory of career interests around which volunteer jobs might be shaped. The skilled volunteer manager will have to operate as a career counselor, helping individuals discover their interests and talents.

### **Changes in Orientation and Training**

Mandated Volunteers are likely to come to agencies with a total lack of knowledge about the purpose and operation of the organization. Volunteer orientation sessions will assume even greater importance, since the basic volunteer population possibly lacks both knowledge and interest in the cause for which they are to begin working. If uncorrected, this is dangerous for the agency and bodes ill for retention of the volunteer. Orientation will also need to contain sections on the basic protocols of the working environment, since for many of the new volun-

teers this will be their very first work experience.

Training will have to expand to include basic skills, including literacy, use of equipment and the basics of customer service and dealing with the public.

### **Changes in Volunteer Supervision**

A volunteer population which is unaccustomed to the demands of work to begin with and then coerced is likely to demand much greater attention and supervision than we are accustomed to, and is much more likely to create unintentional difficulties simply out of ignorance of what behavior or standards of conduct are expected. Coping with this will require much more focused supervision by staff or management volunteers. Smart volunteer managers will consider creating "mentor" or "buddy" systems for new volunteers, to provide one-to-one assistance in learning the new systems. At the same time, additional training will need to be done with staff who have little or no experience in working with these new populations.

### **Changes in Volunteer Recognition**

Receiving the basic organizational certificate is not likely to influence the volunteer who cares little for the organization. Neither is an annual volunteer luncheon held long after their departure.

Good volunteer recognition will need to focus around activities that are developmental in nature and thus have value for the volunteer seeking career enhancement. These could



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include additional training opportunities which build career or life skills. Other recognition techniques might include portable recognition of a tangible nature - books, clothing, etc. - which can be taken with the volunteer and used after their period of service.



For volunteers who come from a discrete population, such as a high school class, recognition that is given "back at the school" among their peer group will become a desirable alternative.

### **Remembering the Opportunities**

The changes suggested above may seem challenging to you. You're probably in good company if you feel that way. I suspect that the volunteer managers of 20 years ago, faced with the influx of Short Term Volunteers, felt the same uncertainty.

Let me close with a final observation, based on the fact that we are facing an incredible opportunity. One of the little noticed side benefits of the trend toward required volunteering is that it will bring into volunteering segments of our society which traditionally have not been involved in mainstream volunteering with agencies. We have the opportunity to introduce these populations to the joys and satisfactions that successful volunteer involvement creates.

Unfortunately, we also have the opportunity, particularly with the younger population of new volunteers, of teaching them during their first experience with volunteering that volunteer work can be dull, unpleasant, and unrewarding.

Which of these happens in your agency and in your community is probably entirely up to the attitudes and skills with which you as a volunteer manager approach these new populations. It will be a learning experience for all of us.



# Acting as a Coach and Consultant to Volunteers

In light of the demands placed upon Volunteer Managers today, it is critical to develop the skills and know the difference between coaching and consulting. As assignments for volunteers in programs expand and grow, the Volunteer Manager will need to equip and direct others and, in turn teach many of those same "others" to develop these exact skills so they too can expand their effectiveness and efforts.

Much of what you will do as a Volunteer Manager will fall under the heading of Coaching and Consulting. Interestingly enough, what many key volunteers and paid staff under your direction will do in their assignments, will also require these same skills which have many similarities along with subtle differences.

## Being a Coach

The American Heritage Dictionary defines coaching as:

*"To teach or train; a tutor. A private tutor who prepares a student for an examination."*

Within our volunteer programs we rarely find "examinations" as such, but there are daily demands that can be met more effectively following individual training. I suppose we could say that completing the tasks successfully becomes a type of "examination."

The role of the coach is very specific and focuses on an exact area of responsibility or job assignment. The Coach:

- Understands the task to be done.
- Can perform the task themselves.
- Can demonstrate or model the task.
- Gently leads the learner through the task....OR.....
- Watches the learner perform the task and either intervenes or offers guidance after the fact to help the learner upgrade their skill level.

- Offers positive feedback on performance to reinforce learning.
- Builds confidence in the learner.

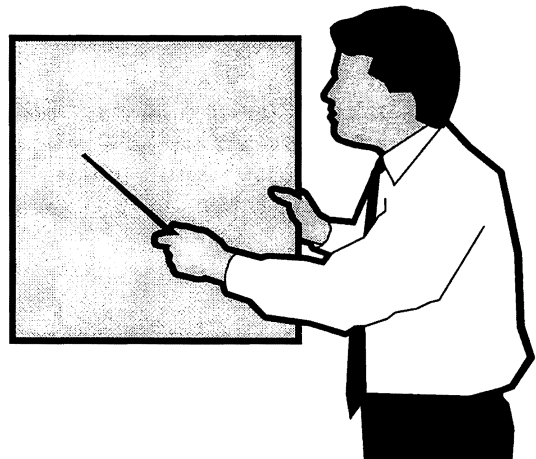
Please note that there are several options in coaching behavior that you as Coach will need to be flexible and sensitive enough to choose between.

In certain situations, especially with more technical learning (computer, machine operation, etc.), the Coach may choose to actually first perform the task THEN ask the learner to repeat the same task in the presence of the Coach to demonstrate that they have understood the training and can do the work safely.

In a second option, a Coach may choose to have the learner perform the task with the Coach watching at close range. In such instances, you as Coach are prepared to step in should any difficulty arise.

When coaching someone in a relational situation (how to calm a frustrated client for example) you will need to simply observe as quietly as possible so that you do not interfere with the delicate relationship. For such tricky assignments, prior coaching and some role-playing may be required.

At a later time, when you and the learner are alone, you can offer feedback regarding the encounter. Be sure to offer positive reinforcement for what the person accomplished effectively....



*"I really liked how you opened the conversation with Jane. It was very positive and friendly."*

You can then offer coaching on what they might do in future encounters to improve their efforts...

*"At the end of such encounters in the future, it might be helpful to the person you're speaking with to end the conversation by noting once again how much their presence has helped the clients we serve. It allows the meeting to end on a positive note."*

You will quickly see in this example, two critical components of coaching feedback:

1. Offer a specific example of the desired behavior: "end by noting...how...presence has helped clients...".
2. Reinforce the reason the corrected behavior would be better: "... a positive note."

## Four Factors in Good Coaching

If you've ever experienced a good Coach in your own life in sports, music or on a job, you can probably remember them as someone who really cared about you and your performance, encouraged you to do your best, helped point out specific ways to improve, really knew "their stuff" and were patient with your own learning rate.

These four factors

*Caring*  
*Competence*  
*Encouragement* and  
*Patience*....

are the keys to coaching success!

### ✓ *Caring*

It is critical that the person being coached believes that you as Coach truly care about their success. Find ways to express and demonstrate this. After direct coaching is over and the volunteer or paid staff is going about their business, remember to compliment them, look in on what they are accomplishing and praise their efforts.

### ✓ *Competence*

Knowing what you are talking about is critical to your success in coaching. For people to learn they must have confidence in the competence of their teacher. Who wants to learn



how to use a computer from someone who can't find the switch to turn it on?!? Demonstrating your own skill level will help learners develop theirs and they will not have to worry about whether they are getting good instruction that will lead to success.

### ✓ *Encouragement*

Remember when you first tried to tame a computer? It probably took you longer if there was no one around who could offer you encouragement, assure you you would eventually figure out how to set margins and indents correctly and that no, you could not make it explode if you hit the wrong key!

Encouragement for specific efforts (not just general, "Oh I'm sure you're doing fine" statements which have no direct attachment to the individual) is often the confidence boost new learners need to "keep on keepin' on!"

### ✓ *Patience*

The fourth factor noted above....Patience with a person's rate of learning... is a critical factor and one that is also strongly required of a consultant.

Everyone learns at a different rate or pace. What is easy for some to grasp is more difficult, and sometimes even impossible, for others. Even whole groups learn at different rates! (Ask any drill sergeant!)

Because you are dealing with adult learners, it is critical that you understand the major kinds of adult learning styles:

- Some want to be "talked through" learning and have the trainer TELL THEM what they need to do. (Auditory learner)
- Some want to "see it" demonstrated and have the trainer SHOW THEM what to do.

have the trainer **SHOW THEM** what to do.  
(Visual learner)

Some want to "get a sense" of what they are to do by being allowed experiences in a **HANDS ON** fashion. (Experiential learner)

Within these three major categories (some people are a mixture of all three or prefer different methods in different circumstances), you will still find a variety of paces ... some, which are faster, some slower and therefore, determine the rate of learning.

It will be up to you as a coach or consultant to judge the pace the person or group can handle and then structure your learnings accordingly.

## Helping People Learn

Some tips for helping people learn:

1. Train steps one at a time; don't jump all around. It can confuse learning.
2. Structure learning steps in logical order; it's easier to learn sequentially.
3. Tie one learning step into the others; it helps people see the relationships between different tasks.
4. Give concrete examples whenever possible.
5. Ask for feedback from learners; is the information getting across as you intend it?
6. Review previous learning constantly.
7. Positively reinforce learners as they demonstrate new competencies or understandings.
8. Ask learners to offer examples from their own experiences that demonstrate concepts being taught. (Abstract concepts can be more difficult for learners to grasp than concrete skills.)

9. Demonstrate when possible, through doing actual tasks or role-playing.

## The Art of Consulting

The American Heritage Dictionary defines consulting as:

*"Seeking advice; exchanging views; conferring; to take counsel."*

This suggests, appropriately, that the role of the

consultant is one of an advisor rather than a person who lays down the law or has authority to dictate actions.

This is a critical distinction and one that trips up many consultants who come to expect that what they offer as an action option will be carried out..... the "I know best, so do it!" attitude.

When you are working with people under your supervision, you will have to make a clear distinction between times you are telling them what to do (your role as supervisor) and times when you are suggesting options (your role as consultant).

*Consultant* role: suggesting actions and responses.

*Supervisor* role: directing actions and responses.

You will also have to be cautious when working with peers or other department heads in your organization that you are clearly in the consulting mode. You do not have the right to demand actions of such folks; you are simply trying to help them sort through needs and problems and suggest how volunteers, for example, might help meet these needs or solve problems.

The role of internal consultant has become more and more important for volunteer program managers in today's society. It is a skill the more successful managers have already honed.

Such volunteer managers understand that the consulting process consists of three stages:

1. *Investigation*: what are the facts and cir-



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cumstances?

2. *Generation of Options*: what are possible actions to be taken?

3. *Implementation*: select best options for others to do.

In most consulting arrangements, the Consultant has been asked by the parties needing advice to come and help them decide on actions. This request may come when:

- There is a problem with current actions; new solutions are sought.
- There are many action-options and confusion as to which is best.
- There is no action at present and advice is sought on what to do.
- An idea or goal has been formed but advice sought as to how to proceed; what is first? second? etc.
- A problem is feared and advice for preventive action is sought.
- A problem has already occurred and advice on "damage control" is needed.

Many times, the most difficult position the consultant must take is one of "hands off". Their role is to advise and suggest, get those who will implement the actions to select the best options, then coach them through possible action strategies AND THEN STEP BACK, allowing those others to carry through.

When a consultant has become deeply involved with the work, it can be difficult to walk away at

the point of implementation, but this is part of being a consultant. You can cheer from the sidelines, but don't expect to be carrying the ball!

The roles of Coach and Consultant will most definitely be part of your work within your volunteer program in the 21st century. It will extend your reach and that of the others YOU teach to be coaches and consultants, thus expanding the effectiveness of your program over and over again.

Hopefully you can learn to take great pride in the successes of those you coach and consult with, knowing that you have positively enabled greater effectiveness.



# Why Good Volunteers Choose to do Bad Things

*John has been a volunteer with Meals on Wheels for seven years, ever since his retirement. He came to the program out of a sense of restlessness and loneliness, but has found himself a home. He delivers meals on three days a week and has established many friendships along his accustomed route.*

*One day while he is delivering meals to Anne Johnson, a regular client, he stops for a moment to ask how she is doing, since he has learned over the years that health problems due to aging have begun to afflict her. She says she is doing "fine," but that she hasn't been getting much rest because of a broken window shutter that bangs in the night wind, keeping her awake.*

*On his next meal delivery date, John shows up at Anne's house with his old box of tools, and proceeds to repair the shutter. Mrs. Johnson is quite pleased. John also is pleased by the results, and thereafter makes a point of looking for additional projects as he makes his rounds...*

*Eventually his program supervisor hears about his extra-duty activities and asks John about them, pointing out that Meals on Wheels isn't really in the home repair business. She tells John that he will have to leave his toolbox at home or he will be suspended from his volunteer position. John is perplexed and disturbed. After all, he was just trying to help, wasn't he?*

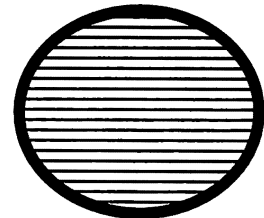
From a psychological standpoint, the act of volunteering is an interesting one, since it would suggest that the volunteer is acting without any self-interest, the classic altruist. In reality, however, the situation is much more complex, and as every volunteer manager knows, volunteers meet their own motivational needs through the act of volunteering. Occasionally, however, the strong urge to meet these motivational needs can conflict in strange ways with the operation of the volunteer program, causing volunteers whose behavior is otherwise good, if not exemplary, to behave in seemingly destructive ways. This article will attempt to explain why these good volunteers suddenly seem to be willfully engaging in bad behavior.

## Diagramming Relationships in Volunteer Programs

Let's start by drawing some diagrams of relationships in volunteer programs.

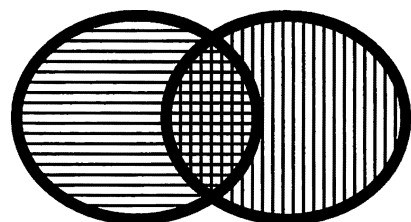
Most volunteer programs begin with a client who has problems. These problems may range from internal conditions to external situations and they may be big and complicated or small and highly defined. At any rate, they create a state of "need" in the client. We can express this state of need on the part of the client by drawing a circle that represents the entire nature of the client and then imagining that one segment of it is a location where this sub-state of need exists:

*Diagram One  
Circle of Client Needs*



Social services agencies are created to address or solve these needs of this client. Usually the agency is not designed to solve *all* possible needs of the client, but is designed to address some specific issue, such as a need for hot food in the Meals on Wheels program or a need to enhance literacy in a tutoring program. In a sense the relationship that exists between the client and the agency can be diagrammed by drawing a second circle overlapping the first. In this diagram there is an overlap between the "need" of the client (to solve their problem or condition; to obtain help) with the "need" of the agency (to engage in meaningful work toward achieving their mission).

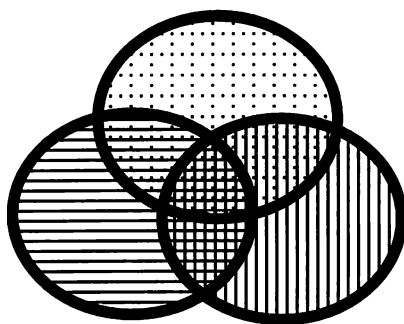
*Diagram Two  
Overlap of Agency and Client Needs*



This area of overlap is what really creates the helping relationship between the two parties; it identifies the parameters within which they "need" each other.

Since social service agencies usually lack sufficient resources they often seek help in the form of volunteers. These volunteers have motivational needs of their own which tend to draw them toward particular causes or agencies and toward working on particular tasks with particular types of clients. The volunteers tend to identify with the tasks and clients and develop motivational satisfaction out of performing work to assist the agency and its clients. When you add the volunteer's needs to our already diagrammed relationships, you get the following:

*Diagram Three  
Overlap of  
Volunteer, Agency  
and Client Needs*



The areas of overlap actually represent the areas or ways in which complementary motivational needs are being met. The overlap between the agency and clients represents both the meeting of the client's need for assistance and the agency's need to perform work. The overlap between the volunteer and the agency represents meeting the agency's need for additional workforce with the volunteer's need for association and meaningful work. As a general rule, the larger the area of overlap the greater the meeting of motivational needs and the deeper the attraction and bonding between the various entities.

To show you how this seemingly simple system can be used to explain "bad" volunteer behavior, let's take a specific example.

## **The Misbehaving CASA Volunteer**

One of my favorite volunteer programs is called Court Appointed Special Advocates. CASA is a program in which volunteers are recruited to serve as advocates for children who are enmeshed within the justice system, often because their parents are defendants in child abuse or neglect cases. The CASA volunteer looks after the interest of the child during the proceedings, providing an impartial representa-

tive whose sole aim is insuring that the best interests of the child are met.

The overall mission of the CASA program can be described best in the descriptive language utilized by its national organization:

*A safe, permanent home isn't something a child should only dream about. Almost half a million children in the United States live in foster care, meant to be a temporary haven. They have been removed from their homes, not because they did anything wrong, but because they've been abused or neglected. It's frightening and confusing for these children to suddenly find themselves in the complex world of social workers, attorneys and judges, people who have the power to decide where they will live and whether they will go home or be freed for adoption. Sometimes, these children can spend years in foster care, waiting for those decisions to be made. With overburdened caseloads, a social worker may not have the time to give the thorough attention these children deserve. They may simply not have the time to listen. One judge had an idea to help these children find a way into safe, permanent homes more quickly. His idea was CASA -- Court Appointed Special Advocates -- trained volunteers who would be appointed by a judge to speak up for the best interests of a child. Now, there are approximately 42,400 CASA volunteers helping abused and neglected children all across the country. But 3/4 of the children who need a CASA don't have one. You can help those girls and boys have a voice in court, and a chance at a future.*

CASA volunteers tend to be highly dedicated to their work, capable of dealing with both the rigors and intricacies of our legal system as well as the sometimes disturbing treatment that has been accorded their young charges. They are subject to a rigorous screening process and receive extensive training on how to approach their volunteer work successfully. CASA standards provide minimum supervisory ratio requirements to ensure that adequate staff monitoring and support is provided for all volunteers.

They are, in many ways, among the most highly qualified and committed volunteers in the country. You might expect their behavior to always reflect these qualities. CASA strives to maintain high standards. It has, in fact, a set of national program standards, one of which



relates directly to volunteer management. Among its edicts is the following:

*The CASA volunteer does not engage in the following activities:*

- taking a child home;
- giving legal advice or therapeutic counseling;
- making placement arrangements for the child;
- giving money or expensive gifts to the child or family.

These activities are prohibited because they conflict with the need for the CASA volunteer to maintain objectivity in representing the best interests of the child. The CASA volunteer is not intended to be a companion for the child, such as in a Big Brothers program, instead they are an advocate for the best interests of the child, and they need to maintain some distance in the relationship in order to maintain and demonstrate their neutrality. Doing so is vital both to maintaining a good working relationship with the child and with maintaining credibility with judges, attorneys, social workers and others in the justice system with whom they work. Engaging in any of the prohibited activities can be grounds for discipline or even termination of the volunteer.

But if you talk with CASA volunteer managers you will find numerous examples of volunteers who are caught breaking these rules, usually through providing gifts to children or taking them within their own homes to provide a moment of safety and shelter.

Why are these good volunteers consciously doing something that they know is “wrong”?

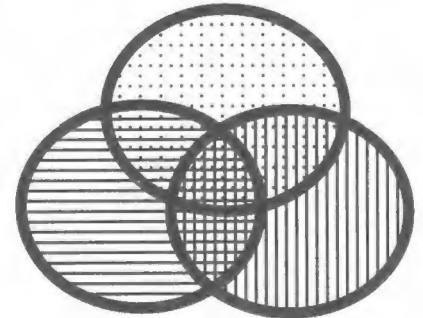


## Why Good Volunteers Do the Wrong Thing

To understand this phenomenon, we have to go back to our diagram of relationships.

In a well-operating volunteer/agency/client relationships there is a balancing of motivational needs and interests:

*Diagram Four  
Agency, Client,  
Volunteer  
Overlap*



Each party actually has a relationship with two other parties, both giving and getting something from the connection. In volunteer programs which match volunteers with particular clients, however, there seems to be an inherent tendency for this overlap to begin to stray, or to become unbalanced.

The volunteer who is assigned to work with a particular client both needs to establish a relationship with that client in order to be successful. They must develop a sense of trust, liking, respect and bonding for the client, one which usually is reciprocal in nature. Volunteer and client must, in a sense, become friends.

Often the strength and attraction of this friendly bond between the volunteer and the client will grow to be quite strong over time, but in fact it can be very powerful even from the very beginning in volunteers who are highly motivated by the needs of the client group. A recent study done for CASA, for example, determined that a child involved in the CASA program would be likely to use the following descriptions about their relationship with the CASA volunteer who is assigned to them:

- “Always there for me; I wasn’t alone.”
- “Made me feel loved/special/important.”
- “Listened to me.”
- “Helped me get what I needed.”

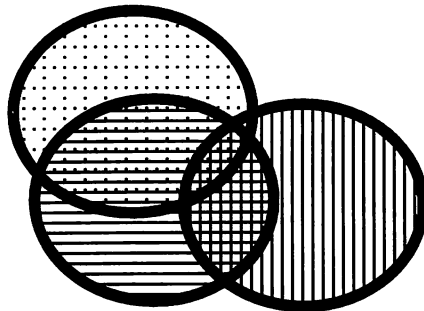
You will notice that none of these have anything to do with what a CASA volunteers actually “does,” i.e., provide objective representation for the interests of the child in court

proceedings. Nonetheless, these descriptions are what the child feels and, most significantly, they are also what the volunteer sees and feels from the child. And, in many cases, they are what begins to dominate the motivational framework of the volunteer - the "need" to provide as much help as possible to the child and to provide it as quickly as possible.

In a sense, CASA creates the likelihood of this occurring by the very language used in recruiting volunteers. Volunteers are not sought because of their interest in mastering the intricacies of our legal system; instead, they are recruited because of their interest in helping children - "a safe and permanent home for every child." CASA posters show pictures of appealing children, give examples of the pain and suffering they have felt, and are specifically designed to appeal to those who feel most compelled to provide help in creating happy lives for the child. The very people most likely to be highly motivated to volunteer to help the child by joining CASA are also the people who are most likely to eventually move toward assisting the child in inappropriate ways, violating the boundaries of their volunteer position.

This shift is easy to "see" if we go back to our diagrams. What has happened is that the motivational overlap has become unbalanced, with the volunteer identifying more with child than with the agency and identifying with needs of the child that do not come with the purview of these services provided by the agency:

*Diagram Five  
Overlap Slippage  
among Agency,  
Client, and  
Volunteer*



The fascinating thing is that those volunteers who are the most dedicated and the most committed are the ones who are most likely to move in this direction. Their own high levels of motivation are what push them to break the rules. This problem is endemic in cases where volunteers are assigned to work one-to-one with clients, but it also exists in other programs such as in crisis telephone centers where volunteers often will give advice outside the parameters of the "approved" answers or in Meals on Wheels programs where drivers suddenly start provid-

ing new and different arrays of services to the clients. To each of these volunteers what they are doing, despite being directly contrary to agency policy, seems to be absolutely the "right" thing to do.

## Keeping Motivated Volunteers on Track

The unfortunate thing is that while what the volunteers are doing is needed and worthy it doesn't conform to the limitations of the agency. Meals programs are not designed to do home repair. CASA volunteers are not mentors and companions. Sooner or later, straying outside the parameters of the agency only results in problems for all concerned.

So how do you restrain these powerful and natural instincts of the volunteer without destroying their motivation to continue volunteering?

Here are tactics ways we can suggest:

1. Adopt and communicate to all volunteers a "non-abandonment" policy regarding client needs that they encounter which do not fall into the normal work of the agency. Urge volunteers to bring these identified needs to you and let them know that you will work to find some way of meeting the needs, usually through referral to another agency. Stress to the volunteer that the agency does not attend to "abandon" the client to further suffering. It is crucial to maintain an open channel of communication with the volunteers regarding these issues, and it is equally crucial to get them to know that you are on the same side as they are - each of you wants to do what it takes to help the client. If a volunteer ever gets the impression that the agency doesn't "care" about the clients they will be much more likely simply to act on their own and they will eventually be likely to stop volunteering for that agency.

2. Provide each volunteer with a clear explanation of *why* prohibited actions have been prohibited. Do not simply cite rules and refer to "policy." Explain why the agency has chosen not to provide some types of services. There are two generally accepted reasons: that the agency isn't capable of doing a good job in the area and that some other agency does exist to provide the help. You can also point out that in order to accomplish its specific mission the agency has had to make choices about the

extent of coverage it can provide. The more volunteers connect to the “mission” of the agency the more likely they are to feel comfortable in keeping inside the boundaries of that mission and not straying.

3. Provide clear rules and procedures, with specific examples of prohibited actions, and build these into “what if” training scenarios for all volunteers. A volunteer is most likely to stray when they meet a new situation which has not been covered in any agency discussion; the volunteer will then tend to act on their own “natural” instincts. As you encounter examples of volunteers “doing the wrong thing,” collect them and use them as discussion scenarios during orientation and training. Over time this will build a set of collective wisdom about “right action” that will tend to be emulated by new volunteers. In one sense, you can intentionally create an ethic of keeping within agency boundaries, telling stories of the volunteer who “resisted temptation” and who “did the right thing.”

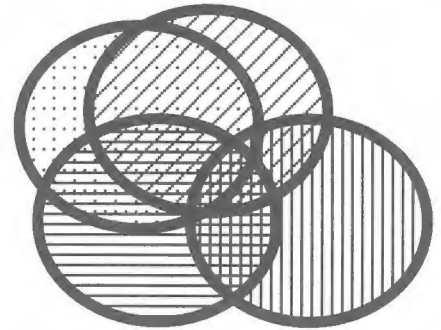
4. Build a sense of personal connection and bonding between the agency and the volunteer that will counter-balance the relationship between the volunteer and the client. This can be done by making the volunteer feel like they are a “part” of the agency, including them in decisions, fostering their sense of identify with agency operations. It can also be done by developing personal relationships between staff and volunteers. One warning about this, however. The most common bonding occurs between the volunteer and their immediate supervisor, often the volunteer manager. A clear danger is created when this bond is severed by the departure of the staff person with whom the volunteer has bonded. In this



all-too-frequent instance, the volunteer will experience a sense of loss and will often replenish their sense of connectedness by turning to the client and seeking to strengthen that relationship.

5. Develop a system of peer pressure by creating bonds among volunteers. In a sense this adds another circle to our diagram:

*Diagram Six  
Volunteers,  
Volunteer,  
Agency, Client  
Needs Overlap*



If volunteers relate to one another they will tend to reinforce good behavior patterns, because individuals will not want to “let their buddies down.” Adding additional volunteers to our diagram allows us to counterbalance the altruistic needs of the volunteer which are directed to the client with the social needs of the volunteer which will be directed toward their peers.

## Conclusion

What all this indicates is that the high motivational levels which initially cause people to volunteer have some potentially negative sides. High motivation can lead to burnout. It can also lead to disillusionment if expectations cannot be met. Each of these will result in volunteers leaving a program.

And, as discussed here, it can also lead a perfectly good volunteer to sometimes engage in behavior that is “bad” from the context of a program, but which is entirely rational from the viewpoint of the volunteer who is determined and eager to help a client that they value. Volunteers have always been known for being willing to “do a little extra,” and this is just one more case of where that willingness is perhaps an inherent part of the volunteer experience.

# Working with Self-Help Volunteer Groups

More and more of the people who direct volunteer programs are encountering self-help groups which address the same causes served by their volunteers. Although these groups rarely come under the direct supervision or responsibility of the DVS, their leaders often turn to the DVS for advice, especially if they run into problems.

About a year ago I was asked to train leaders of self-help groups in Belgium and the Netherlands who addressed the sensitive issue of facial deformity in children. Most were parents experiencing the challenges of the problem and also trying to serve others who shared their challenges through their local chapters.

The following are suggestions for self-help groups that I shared with them, both as someone familiar with sound volunteer management and a one-time parent-founder and leader of a self-help group for children with learning disabilities.

## Critical Elements

The following are essential elements for a well-functioning group:

1. *Have a strong Mission Statement, Goals and Objectives that are CLEAR and CONCISE.*
2. *Measure all actions against the Mission Statement and Objectives.*
3. *Stay flexible; keep the clients in mind; retain your sense of humor; leave before burnout!*

Here are the differences between mission, goals and objectives:

Mission Statements:  
Tell WHY you are here.

Goals:  
Tell WHAT you seek to accomplish.

Objectives:  
Tell HOW you will achieve your goals.

## An Example

Consider an example used for the establishment of the Downers Grove Association for Children With Learning Disabilities (DGACLD), Downers Grove, IL, USA.

### Mission:

The DGACLD promotes positive support for children with Learning Disabilities, their families and the professionals who interact with them so that they might reach their highest potential.

### Goals:

1. To seek out and relay information on Learning Disabilities to parents, professionals and the general public.
2. To promote positive collaborations with professionals who work with LD children and their families.
3. To recognize and appreciate the vast diversity of challenges within the LD classification and to welcome parents who face these diversities.
4. To continually seek out and share information on resources available for people with LD (Money, programs, professionals, research, books, articles, etc.).
5. To afford all members the opportunity to be heard, to participate and to have a voice in group decisions.
6. To operate our organization in a sound ethical, fiscal, managerial and open manner.

### Example of Objectives for Goal 1:

A. To share with members, in the monthly newsletter, information forwarded from the Association for Children with Learning Disabilities (America's national organization for children with learning disabilities.)

B. To assign a member the responsibility of gathering news, research, etc., that impacts LD from media, the Internet, medical sources and others and relaying it to the membership through the monthly newsletter.

C. To assign a member the responsibility of continually keeping the public informed about LD, our association and available help through newspaper articles, cable TV, a speakers service for clubs/organizations, etc.

## Tips for Leading Self-Help Groups

Tips to keep in mind as you lead self-help groups:

1. People are members because they want to help Themselves or their Loved One.
2. Members bring their own "baggage" of personal experiences. Respect their passion and pain.
3. Some members may only want to focus on their particular challenge, not the variations other members bring to the group.
4. Some members may want to dominate and control the group.
5. Founders or long-time members may not want to see change in the group.
6. Some members may want all the benefits the group can offer but none of the work.
7. Some members (especially parents) may have unrealistic expectations for their loved one or themselves and want to blame the group or others for failure. They are simply displacing their anger.
8. Confidentiality must always be guarded. Always. Protect clients/members.
9. Beware of assumptions. Find out the facts before making judgments.
10. Take care of yourself!
  - Watch out for burnout! If the cause impacts you personally, recognize the double drain on your energies, time resources, creativity and health. Even therapy can be overdone!
  - Have realistic expectations for yourself and what you can do.
  - Leave before you are thrown out! (Or at least move to the background!)
  - Put yourself at the top of your priority list. If you don't take care of you, how can you take

care of others?

· You have not been elected Ruler of the Universe, so don't believe that you have to love, fix or tolerate everyone who comes into your life. You are human. That's a good thing!

And one last reality: There are those people who may join your group who simply can't be "fixed"...they have a hidden agenda that does not match what you are trying to do (your mission) or they are simply not nice people!

As you will note in these suggestions for self-help groups, none of them are formal or worded to take every eventuality into account. They need to remain simple to read and grasp so that the group leaders can turn them into action.

Overly cumbersome bylaws, rules or regulations often get in the way of the intent of the group, which is typically established so that members can help one another while getting help themselves. As groups grow, they may need more complex tools to go about their business, but the simpler the better as they start out and work their way toward their mission.

There are many books on the market that can offer greater depth in group dynamics, volunteer management, conflict control, etc. Your greatest role may be that of pointing the way toward such resources, so that the group leaders explore and find their own answers to their specific challenges.

Self-help groups have a distinct personality of their own with the common thread being deep involvement in the cause, either because of member's own experiences or the care-giving and support role they have with loved ones. This distinguishing characteristic often makes them more emotional in their efforts, a factor each of us must understand as we attempt to assist their good efforts.



# Creative Ideas for Volunteer Recognition

Recognition is rooted in a philosophy of being "user-oriented" and good programs reflect this understanding in how they honor their volunteers.

Far more than a banquet at the end of the year or a really ornate plaque, recognition begins with good job placement, which "recognizes" the unique skills, abilities, aptitudes and personality of individuals.

Volunteer program leaders cannot know every volunteer that comes through their door intimately, but they or people they assign to the task of recognition and placement, can gather clues as to what might be most appreciated. A recluse would obviously not feel comfortable accepting an award in front of 500 people or being asked to take a job requiring public speaking; an extrovert might not feel very thanked if sent an impersonal note of gratitude from some board member they had never met, etc.

## Matching Recognition to Motivation

To know more about matching recognition (and assignments) to people's personalities, we can turn to the writings of David McClelland who gave us his Motivational Categories. In reading through them, please note that all of us are all three motivations, but in specific settings, one dominates the others.

Please note that folks change motivations through time, so that your long-term volunteers may need to be assessed periodically to see if



the old "label" still fits. Is the person who came to your program in search of friends (an "Affiliator") still in that category, or has her social calendar filled to overflowing and she is now into really getting things done (an "Achiever")? Abraham Maslow teaches us that a met need no longer motivates. Keep this in mind when recognizing volunteers and paid staff who have been around for a long time.

Here are some of McClelland's teachings as they might apply to recognizing volunteers:

*Achievement Motivated People:* These are folks who are most enthusiastic when they are given specific goals and tools to get a job done that can be quantified, such as raising money, recruiting volunteers, leading a project, etc. They enjoy people and often see them as part of the machinery which is needed to accomplish set goals. They can be very loyal to your organization because they admire the way in which you accomplish goals.

Achievers respond to recognition and/or assignments that:

1. Quantifies their success ("Joe raised 50% more money for our cause than anyone has before!")
2. Offers tangible rewards such as plaques, pins, letters of commendation, etc.
3. Tells others of their specific achievements. (Bosses, co-workers, family, etc.)
4. Is connected to jobs with clearly stated goals. Clear direction becomes a great reward to them.
5. Recognizes them to the general public, telling of their specific deeds.
6. Recognizes them to members of other groups to which they belong, such as a faith congregation, professional association, community-action organization, etc.
7. Allows them to be "promoted" into positions of greater authority or responsibility.



8. Comes throughout the life of a project. This satisfies their need to have checkpoints along the way so that they know they are on track and adding small successes toward an ultimate goal.

*Affiliation Motivated People:* These are folks who value relationships above all else. They want to be liked and be surrounded by others whom they like. They hate conflict and strive for harmony among people. They are very loyal and often motivated by a commitment to the people served by your programs. They need to know they have made a difference in the lives of clients or consumers.

Affiliators respond to recognition and/or assignments that:

1. Allows them direct contact with clients.
2. Gives them opportunities to work with others, especially those with whom they have been connected in their personal lives, such as family, friends, neighbors, co-workers.
3. Allows them to work in a group on projects.
4. Provides notes or gifts from clients.
5. Gives them some tangible, recognizable symbol that instantly identifies them as part of a successful group, such as a uniform, etc.
6. Offers social opportunities such as potlucks sack-lunch workdays, banquets, etc.
7. Provides letters to those they care about which cite their contributions to the agency.
8. Highlights to others how much they have helped clients, giving specific examples.

*Power Motivated People:* These are volunteers who wish to impact and influence others. They are excited by assignments that afford them the opportunity to persuade others to support the organization. They are typically motivated by the cause being served if the organization is truly making a life-long difference in the lives of recipients. They love the "teach people to fish" concept rather than "giving people a fish" efforts.

They use personal, positive power rather than negative, coercive or threatening power. They



love to enlighten others and tackle assignments that others might avoid because of potential conflict.

Power-motivated volunteers respond to recognition and/or assignments that:

1. Can be used to persuade or recruit others to the cause.
2. Can be used to broaden the public's knowledge of the agency or program.
3. Quantifies specific accomplishments.
4. Offers jobs that allow them to persuade others.
5. That allow them to interact with high officials or other power people.
6. Gives them opportunities to interact with high level officials of your organization and gain extensive information they can use in persuading others.
7. Offers an impressive job title they can use to open doors in the community.
8. Provide personal notes from high level officials of the organization or community.
9. Gives them opportunities to teach others.
10. Names an effort, site or program in their honor.
11. Gives them a chance to innovate.

Outstanding programs incorporate an understanding that recognition is an on-going process and not an event or two. Leaders in such program see to it that rewards come to volunteers not just through banquets, plaques or pins but through caring, considerate and effective volunteer management, beginning with good placement, job assignments, training and supervision.

Such programs listen to volunteer's needs and try to meet them to the extent that they do not detract from the goals of the program or agency. They choose rewards that are appropriate, timely and creative....even fun at times! They work to make the climate and setting in which volunteers work the most positive, enabling and productive possible so that in between times of specific rewards, there is a deep satisfaction that their efforts are truly making a difference.

## Matching Motivation to Time Availability

Another way to approach recognition is in terms of whether your volunteers will be around for a long or a short time. Here, for example, are some ways to better motivate time-crunched volunteers:

1. Give them assignments that can be accomplished at their convenience in a location of their choosing.
2. Keep them part of your volunteer "family" by sending them regular newsletters even when they are not actively working with you.
3. Send a letter thanking them for a specific effort they completed. Send a copy to their employer for their permanent file.
4. Mention them and their work in your newsletter.
5. Know enough about them to know any hobbies, collections or special dates coming up. Work this knowledge into recognition efforts.
6. Create a "pass" that is given to an episodic volunteer who has completed an assignment. This "pass" would say something like: "Because you have completed your assignment with flying colors, you may now enjoy a short recess. This pass celebrates whatever time you need to catch your breath and guarantees your smooth and welcome re-entry to our program at anytime that your busy schedule might permit. We look forward to your return! We, and our clients, need you!"

In general, recognition of *short-term* volunteers should center around:

- Recognition at work-unit level

- 'Portable' recognition
- Recognition at home, paid work
- Presenter is colleague or co-worker

While recognition of *long-term* volunteers should involve:

- Recognition within the group
- Use of group symbols
- Increased power, access, involvement
- Presenter is authority figure

## Recognition Ideas

Simply great ideas for you to imitate:

1. Send a thank you note to the volunteer, specifically noting what they did and how it impacted the clients or services.
2. Send a copy of the above to employed volunteer's supervisor and personnel file (with their OK).
3. Send a thank you note to spouse, children, parents or other significant people in your volunteer's life, thanking them for being supportive of the volunteer in a way that allows them to work for your program. Be as specific as you can.
4. For youth volunteers, send a letter to parents, grandparents or guardians stating how much you appreciate their child and thanking them for instilling the values that laid the foundation for their youth's volunteering. Be specific.
5. Establish a display in a prominent area of





your facility that tells everyone what the volunteers do and highlighting specific accomplishments. Keep track of which volunteers have been spotlighted there to try to feature as many different volunteers as possible during the year.

6. Offer committee and task force chairs, volunteer supervisors and others who work directly with volunteers the opportunity to recognize individuals on the display area mentioned above.

7. Take a photo of every new volunteer as they come to work for you. Consider them the "class of 2001" etc. On a bulletin board everyone sees, place their picture, name and assignment on display to introduce the new folks to your entire organization.

8. Ask Board members to drop a personal note of welcome to new volunteers.

9. Ask your CEO to drop a personal note to outstanding volunteers. Give the CEO specifics to mention in the note. This also serves as a way to keep the value of volunteers in front of the highest levels of your organization.

10. Retain the photo used to introduce new volunteers in their respective files. Use randomly through the year to spotlight a particular success or personal note by displaying it in common areas such as a break room. You can note specific efforts within your program ("Greta recruited four new volunteers for us in March.") or an event in their personal life ("Sam turns the magic 50 today!" or "Give Sam a hug today...his youngest daughter is getting married and he's already missing her!")

11. Have an artistic volunteer personalize

coffee mugs for all volunteers.

12. Create and ask staff to wear buttons that say, "We appreciate volunteers."

13. Create and ask volunteers to wear buttons that say, "We appreciate staff."

14. Gather thank you notes from willing clients that can be given to volunteers as recognition gifts.

15. Have designated parking areas for volunteers.

16. Have a designated parking space for "Volunteer of the Month."

17. If your program is part of a large facility, create an instantly recognized symbol for volunteers to wear that identifies them as a volunteer. Ask volunteers to help design this symbol, such as an armband, uniform, vest, badge, special nametag, etc. You may wish to have a variety of items so that each volunteer can choose the symbol with which they are most comfortable. This allows long-term volunteers who are very attached to their traditional pink uniform to keep on wearing it while a new volunteer can opt to avoid the uniform and instead wear an identifying armband or name tag.

18. "Name" the coffeepot for a volunteer who has "poured themselves into their work." Change this regularly.

19. Keep a record of volunteer's birthdays. Send a card or e-mail note.

20. Give weary volunteers a leave of absence to prevent their total burnout. Keep in contact during this period.

21. Create a relaxed, easy-going newsletter for volunteers. Assign a creative volunteer to be the Editor.

22. Buy a large stuffed teddy bear. Move it from workstation to work station. Attach a sign around its neck: "I just love volunteers. Want a hug?"

23. Buy boxes of inexpensive valentines. Send them to volunteers year round, at random.

24. Find out what organizations your volunteers belong to such as Jaycees, Junior Women's

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Club, churches, etc., and write a short article about the volunteer and their impact to whatever publications those groups produce.

25. Find out who has e-mail. Add them to your address book and send notes to them when news warrants or you wish to thank them for a job well done.

26. Keep a file on every volunteer (or have their direct supervisor do so) that continually updates information that might be used in recognition efforts: birthdays, anniversaries, college attended, home town, spouse/children's/ grandkids' names, hobbies, collections, memberships, affiliations, profession or paid work, talents, needs, interests, etc.

27. Submit pictures and stories of volunteer accomplishments to their college alumni newsletter or hometown newspaper.

28. For outstanding accomplishments create an annual award in the name of this volunteer.

29. Name a wing/room/area/program for an exceptional volunteer.

30. Place and then stock an unusual container (bucket? basket? cradle? flowerpot?) with candy kisses or Tootsie Rolls to continually say thank you to volunteers. Place it next to the site that they use to sign in for work.

31. Sponsor an ethnic potluck. People bring a food native to their country of origin.

32. Keep volunteers informed on decisions that impact them. Include them in the decision making if possible.

33. Sponsor and carefully plan a "bring your child to work" day; allow children to see and experience their parent or grandparent's volunteering.

34. Make friends with the Feature Editor of your local newspaper or cable TV station. Feed them stories of what volunteers do to make a difference.

35. Sponsor a "cutest pet" contest: have volunteers bring photos of their pet and display them all. Get small blue ribbons and put one on every picture.

36. Send a "care" package to volunteers leading complex efforts. Include a candy kiss, a pacifier

and other objects meaningful to them.

37. Create a "tantrum mat": a paper place mat with the outline of two shoes and instructions to "jump up & down, flail arms and scream when things get too hectic. Crying is permitted!"

38. Create "permission slips" to give out to volunteers in the midst of difficult assignments that allow time out, hair-pulling, a nap, an ice cream cone, a no-guilt hot fudge sundae, giggling or any other rather silly suggestion that might ease tension and tell them you understand what they are experiencing.

39. Have a designated space for coats, umbrellas, etc.

40. Have adequate designated space for volunteers to work.

41. Offer free passes volunteers can use to attend appropriate staff seminars.

42. If meals are served at your facility, allow volunteers to eat free or have the same discounts as paid staff. If this is impossible, give free tickets for one item they purchase per week.

43. Offer support groups for volunteers who work in emotionally charged placements such as hospice, crisis centers, etc.

44. Offer wellness training for volunteers working in high stress settings.

45. Plan a recognition banquet.

46. Suggest (don't mandate) that volunteers wear costumes or a symbol of holidays such as Halloween, Christmas, 4th of July, etc. Don't



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forget to include non-Christian holidays or those in the cultures of individual ethnic groups.

47. Create a Rewards Committee of volunteers. Assign them the task of suggesting creative ways to recognize fellow volunteers and paid staff who regularly work with volunteers.

48. Arrange discount coupons from local restaurants, theaters, stores, etc. to be given to volunteers.

49. Make Volunteer Week (typically in late April or early May) a special time to publicly recognize volunteers.

50. Take key volunteers to a Board meeting and introduce them to members, telling specifically what they have accomplished.

51. Leave anonymous notes of thanks at workstations, on e-mails, on small posters in the halls or on elevators, etc.

52. Create a Wall of Fame on which the names of outstanding volunteers are placed each year. Create a criteria or top award that spells out how this honor is achieved.

53. Create pins and plaques that the volunteer is awarded and can have to take home.

## The Keys to Recognition

Remember that good recognition is user-oriented, targeted, enabling, specific and often more informal than formal. A smiling greeting to volunteers as they report for work can do more to say thank you than a form letter. Having a place to park, put their coat, grab a cup of coffee and see their efforts lauded on the bulletin board or in the newsletter can mean more to many volunteers than a gold watch or fancy plaque.

Outstanding programs have also realized that they must be sensitive to the needs and wants of individual volunteers. Some people thrive on public recognition; others cringe when it is given. Some folks wish to be anonymous in their efforts, others would prefer the brightest spotlight possible on what they do. Good program directors respect differences and proceed accordingly.

Good recognition processes typically have

appropriate fun and humor mixed into their efforts. They are also creative, flexible and informed. They do NOT believe that it is enough to have a whiz-bang banquet at the end of each year and never recognize folks through the other 364 days. They understand that recognition designed for the volunteer of the 1950's or even 90's may not be appropriate any longer. They constantly review their efforts for relevance and significance.

Recognition is the art of catching people being Good and taking the time to tell them so.



# The Art and Science of Volunteer Retention

I have told my training audiences for two decades that I was always tempted to write a book on recruiting and retaining volunteers, but kept tripping over the title that popped into my head as it would probably be a big "turn-off" to a lot of super-sensitive folks. To say that it would have been "politically incorrect" is an understatement, although I must say it probably would have garnered a lot of attention.

The title I wanted was: "Volunteers: How to Snag 'Em, Bag 'Em and Tag 'Em!"

I'll share my basic thoughts here on what I consider to be key points of the art of keeping volunteers around after they first sign up. I hope you find a line or two useful.

Let's begin with a basic definition:

*Retention:*  
*the art of keeping or maintaining to keep in one's service.*

In the wider world of volunteerism, and to the folks charged with overseeing volunteer activities in any variety of settings and organizations, the issue of retention can get lost amidst the flurry of recruiting, supervising and recognizing volunteers. That is understandable, as these three are considered the "guts" of effective volunteer activities—getting folks to sign on, directing their work and finding creative ways to thank them should have major emphasis in the work of the DVS's of our world.

Intertwined, however, is the issue of retention, which is directly impacted by how clearly vol-

unteers have been recruited, how fairly they are supervised and how effectively they are rewarded. Obviously, a volunteer who has been recruited dishonestly ("You never mentioned I'd have to do THAT!"), supervised unfairly ("Why are you holding me accountable for something you never told me I should be doing?!") or not thanked appropriately, won't hang around very long in any program.

Getting volunteers can become the easier challenge when faced with that of keeping them around, so that their experience, commitment and body of knowledge can increasingly serve your clientele.

## Retention Factors

Volunteers, and paid staff for that matter, stay in a program where the factors that surround them ENCourage them to continue. They leave when factors DIScourage continued involvement.

The primary factors that determine whether volunteers stay ("retention") or leave ("rejection") are:

1. *Expectations for Behavior:* What the agency expects of the volunteer in relation to work, clients, others and themselves.
2. *Rules:* Formalized regulations for how work is done; demands of the program on those involved.
3. *Systems:* The processes for carrying out work.
4. *People:* Appropriate relationships with others.
5. *Communication:* How information is shared.
6. *Rewards:* What is rewarded, how and when.
7. *Climate:* Norms or unwritten rules governing behavior.
8. *Setting:* The physical surroundings and factors.





9. *Success and Impact*: Perceptions and definitions of making a difference.

10. *Individualism*: What the volunteer brings to the position: expectations, time constraints, skills, adaptability, wellness, experience, energy, stability, commitment, needs, motivations, self-image.

All of these factors play a role to a greater or lesser degree in the retention of individual volunteers. As the director of volunteers, it becomes your job to see to it that these factors are as good as possible, so that the majority of volunteers will find them fair, pleasant and enabling as they go about their work assignments through time.

A word of caution, however. It would be impossible to retain every volunteer on a long-term basis in your program. Bluntly, you wouldn't even want to! Sometimes your best reward for doing your job well is that Clara the Complainer and Tom the Trouble-maker decide to share their charming personality traits with some other program!

For those vast, vast majority of great volunteers who come through your door however, it would be unwise to expect that you can retain their services forever or at least until you retire. People are dynamic and their lives shift and change as well as their motivations, time demands and interests. Expect that; it's normal. To paraphrase a rather nasty bumper-sticker phrase: "Shift Happens."

In examining the factors of retention, we must temper our understandings with a willingness to accept normal attrition due to the shifts in people's lives. Being gracious as people leave may set the stage for their return. Beating our breasts and calling them various derogatory names or trying to lay a guilt trip on their head won't help your cause in the long run, and may in fact get you in a whole barrel of trouble!

As in parenting, "letting go" may be your biggest challenge within the framework of "retention," but reap the biggest rewards in the long run.

## Expectations for Behavior

Key elements include:

1. Examine expectations you have for behavior. Are they realistic? Do you have people on your paid staff or among your long-



term volunteer corps who feel that volunteers should all look and act alike? You will need to correct their incorrect conclusions□quickly!

2. Ask volunteers and staff to brainstorm expectations. Then ask them to divide them into "healthy," "unhealthy" or "not sure" headings. Discuss ways to strengthen healthy expectations and eliminate unhealthy ones.

Identify expectations you are not sure of that can be ambivalent: when are they good, when bad and what makes them so?

Let's look at some examples of unhealthy expectations:

- All volunteers will come to our program with a deep understanding of what we do and why we exist.
- All volunteers will be well-educated and therefore articulate in expressing our message to groups to which they belong; they will, of course, understand that that is one of the things we will ask them to do.
- All volunteers are signing on for the long haul; they will be with us for many years and give us many hours of work every week.
- Everyone will adapt to our normal fast pace of work and constantly changing instructions on how we do that work; they will understand and accept that their work will probably change on a regular basis.

All of these expectations are really assumptions and if you are over the age of 12, you already know what assuming really means: disaster!

Always "check out" different people's understanding of your program, its clients and services, their educational background, their willingness to speak before any group, their time commitments and demands, their normal "pace" and energy level and ability to adapt to change.



3. The following expectations usually promote retention. Expectations which are:

- *Realistic in terms of time and energy.* Assignments given to seniors may be done at a different pace from those of teenagers. (Beware of an assumption buried in that sentence—the seniors may be more likely to get something done more quickly than into-everything, hormonal-guided teens!)
- *Applied to everyone fairly.* Nothing is more unsettling than finding that "rules" that apply to you do not apply to others. Keep things fair and even.
- *Considerate of other demands on volunteers.* Extend great consideration around time demands that pop up in other parts of their lives. Expect seasonal demands from parents of school age children who are very busy at the start of the school year and at its end. Holidays demand more from people also, especially Christmas and Hanukkah. Be understanding and respectful, demonstrating that you understand they have more going on in their lives than just working with you.
- *Spelled out at the time of the job placement.* I always thought that there should be several more commandments to guide us in our lives, among them: "Thou shall not hide elephants in closets." Be sure to be clear about what a job entails at the time you are talking with a volunteer about possible assignments. Never hide parts of a job that might be uninviting. I always preferred to be honest with a person about what is going to be expected of them at the very start of our relationship rather than "springing" anything on them after they have said yes. Why would anyone trust someone who has not been truthful with them in the first place?
- *Flexible, so that the job and the volunteer "fit."* I've seen some very creative solutions to removing roadblocks in front of a volunteer's placement including job sharing, alternate site for work, etc. If you need table decorations for a banquet, why does it matter if a volunteer does the work with two others in her home rather than alone at your office? Bend without sacrificing the goal of the work.
- *Openly shared with everyone involved.* Keep people "up" on what is going on so that they are not "down" on anything. I suggest a time-lined work sheet that everyone has. It lists

who does what, when, and contact information for everyone, so there can be direct contact between working volunteers. This tool becomes a way to hold everyone accountable and underlines to worker A why it is critical that they write the copy for the new brochure before a specific date that worker B has to have it typeset and to the printer.

- *Openly focused on the mission of the organization.* For work to be truly understood, those involved must see the reason for the work and that it leads to the ultimate goal of the organization. This can get tricky if the volunteers are stuffing envelopes and don't understand why that's important. Making it clear that what they are doing is part of a public awareness effort that will help raise the money to serve clients clarifies the connection to the organizational mission.
- *Measurable.* Be sure that folks understand what success is. Set measurable, attainable goals for any assignment. Avoid vague goals. Making the church "more friendly" is too vague; express the same goal in measurable objectives, such as "Make a point to greet at least two newcomers to the service each week, recording their name, etc., for future contacts."
- *Matching skill levels and interests to work assignments.* Giving folks work that they are capable of doing and like to do, simply makes for a happy match for all involved.
- *Leading to success as defined by the volunteer.* Find out what the volunteer would consider success in a specific assignment. Redirect their thinking if it is unrealistic ("I want to work for you to wipe out poverty in our city in the next year") or if you discover they have misinformation about what you do.

I ran into this a lot when I was National Director of Project Concern...an international health charity that served the children of poverty. Our



volunteers were in the fund raising arm of the agency, helping to run walkathons across the country. Many folks, unfortunately, came to volunteer for us thinking they would be able to have direct contact with poverty stricken babies rather than sitting at a check point in a Walk for Mankind in their community. If we had not clarified this at the start, they would have been sorely disappointed and not felt "successful."

Expectations, when not spelled out or uncovered, can be a major reason that a person leaves the volunteer ranks of any program. Victor Vroom, a verbose but wise human behaviorist, first spelled out his Theory of Expectations by telling us that when reality does not live up to expectations the person involved feels let down, betrayed and untrusting. Don't let that happen in your program.

## Rules

Understand the following:

1. Rules must reflect common sense. Ever bump into a rule that makes no sense at all? Then you understand what I mean.
2. Rules must be reviewed periodically to insure that they are not out of date. In one village in central Illinois there was a rule in the by-laws of a local women's organization that they would commit a "proper amount each year to the continual beautification of the downtown square and band-shell." There was only one problem with that rule: the band-shell had been torn down in the mid 50's! Rules that make no sense need to be filed in the permanent round file.
3. Rules must be realistic. Avoid pie-in-the-sky, unrealistic rules, such as "All volunteers must have at least 10 years of community service before working with our agency."
4. Rules should not reflect an over-reaction to



an occurrence, especially if preventing a re-occurrence can be handled in a less formal manner. Example: A volunteer parks in the wrong place near the building. The head rule-maker immediately carves the following in stone: "Any volunteer parking in an incorrect slot will be fined \$10 and required to find another way to come to the agency without benefit of their own vehicle." This falls into the "give me a break!" category of justified departure.

5. When rules are made, consideration must be given to how they will be enforced and by whom. If rules are broken but no one addresses their enforcement, volunteers observing this non-response will often be turned off and leave a program.

6. Rules should be created around issues of:

(a) Safety: "Anyone dealing with contact or transport of any bodily fluids must complete the four-hour in-service training program for 'Blood-borne Pathogens'."

(b) Security: "In case of a fire alarm all volunteers will cease activities and proceed as directed to the nearest specified exit."

(c) Common good: "Volunteers are asked to put any dishes away after enjoying a cup of coffee or snack in the Volunteer Office."

(d) Administration: "All volunteers must sign in at the Volunteer Service Office in order to track attendance and allow the office to know where to reach them in case of emergency."

(e) Compliance with requirements of governing entities: "All volunteers must attend an orientation to the facility before beginning their assigned work." (a requirement of the organization's Board) or: "All volunteers must agree to a criminal background check before being considered for assignments that require direct contact with our youthful clients." (A Board requirement or that of a state licensing bureau, etc.)

7. Rules irritate people when they are enacted to satisfy personal preferences rather than real issues. Example: a wealthy donor gets Rosamund Rulemaker to institutionalize his preference for the green and gold of his alma mater, thus creating the following: "All uniforms will be in green and gold as well as all stationary, brochures and materials."

When making or enforcing rules for your volun-

teers and paid staff, make sure they are logical and have a real purpose. Rules for the sake of absolute control can do more to damage your retention rate than almost anything else. Identify anyone in your organization who is rule-happy. Typically this is a very up-tight person with a need for control that will do more harm than good in the overall management of your program.

Let common sense prevail, write everything in pencil, and avoid unnecessary rules that obscure those that truly are necessary for the safety and welfare of those involved.

## System

Systems are those processes that people must follow to do their work. They impact retention of volunteers dramatically. Keep in mind that retaining volunteers in positions is dependent on the CHOICE those volunteers make.

Obviously, volunteers stay where they feel successful, appreciated and effective, but there is a deeper level of decision that often hinges on HOW they do their work: how easy or how difficult; how simple or complex; how straightforward or convoluted.

A rule of thumb: *Systems must not hinder success!*

1. To maximize volunteer retention, take a close look at the systems or procedures that dictate work efforts. For each, check for:

- *Common sense*: Is it logical?
- *Efficiency*: Does it represent the most time-effective route to success?
- *Simplicity of procedure*: Is it the easiest way to get the job done?
- *Effectiveness*: Does it help volunteers be successful?
- *Connection to mission*: Does doing this move you toward your stated goal or mission?
- *Simplicity of wording*: Is it easy to understand?
- *Relevance to today's circumstances*: Does it fit current needs, trends, demands, clients, volunteers, climate, etc.?



- *Sequential logic*: Does it proceed sequentially, Step 1, Step 2, etc.?
- *Desired results*: Does this system lead to the desired results?

2. Are your systems reviewed periodically to insure their continued efficiency and logic? As times and trends change, they often call for adjustment of procedures and systems to realign them with reality. The introduction of technology in the last ten years has caused many systems to be revamped and will continue to do so for some time to come. Change is the only constant....

- Systems that once included mandates to provide "carbon copies" of all correspondence has hopefully given way to instructions that direct workers to copy e-mail communications to those involved.
- One prominent charity almost self-destructed when the founder insisted on a communication system that included his personal review of all out-going correspondence!
- Chrysler completely reconfigured their work when they opened a new facility in Michigan that allowed different disciplines to interact from step one of planning models. Thus, engineers, marketers, sales reps, production supervisors, designers, etc. were coordinating efforts and adding their unique perspectives from day one of a new model rather than after each department had finished their part. This eliminated "blind-layering" and assumptions that had caused enormous problems and massive complications. It simplified systems ten-fold, making it easier for workers to be successful. This same principle translates to volunteer's work.

I had the unfortunate "opportunity" to work with several organizations who had never

understood the importance of good systems. They seemed to revere anything that was complicated, nonsensical, out of date and Byzantine. Of course, they were calling me in to see if I could figure out what was wrong in one small segment of their operation, and when I looked into it, the problem was systemic and typically set in stone.

"But we always" and "but we never" were sentence starters whenever I pointed out the problem, and I knew I was in for a rough ride. Sadly, when I found such an organization was entrenched in its awful systems because of a blind leader, there was little hope of correction. My solution was typically to: (1) write up as direct a report as possible; (2) offer concrete suggestions for remediation and (3) never go back. Yet another form of non-retention, I suppose.

## People

There may be no factor within your program that impacts retention more quickly and obviously than the relationships volunteers and paid staff have with each other. People simply stay longer in situations where they enjoy their co-workers and others they encounter.

Here are a few suggestions to consider that can impact this aspect of retention:

1. Recruit volunteers in units: families, friends, neighbors, club members, co-workers, etc. Often individuals will come aboard more quickly and stay on longer when surrounded by those they know and care about.
2. Encourage volunteers who are beginning to show signs of burnout to recruit someone they know to help them in their assignment. It may revitalize them and prolong their stay.
3. Observe relationships that develop between



volunteers and others. Reassign volunteers who are having difficulty with specific supervisors, clients or other volunteers to reduce and minimize friction. Assign new assignments to sets of volunteers who obviously enjoy working together to tap into and maximize the energy these relationships generate.

4. Carefully assign volunteers so that good "matches" of personality, motivations, etc. are aligned. When you find they don't fit as you had hoped, reassign them quickly. Do not allow bad mixes to continue—they will almost guarantee the departure of several people!

5. Encourage social opportunities among volunteers. People who get to know one another tend to stay in situations simply because they enjoy the personal contacts. A few potlucks for volunteers throughout the year can be a great insurance policy for retention as participants make new acquaintances, discover commonalities and share their common commitment to your cause. Never underestimate the power of FUN!

6. Find legitimate ways for volunteers to work together in small enough groupings that they can get to know one another personally. This creates relationships that can forestall any future problems. If a person is a friend or trusted colleague, individuals tend to problem solve between themselves rather than letting them grow into giant difficulties. It's the opposite of the 'mountain out of a molehill' principle!

## Climate

The climate of an organization is the feel of the workplace. For volunteers, this climate is real, tangible and a major factor in their decision to stay or leave. It is not unusual to have potential long-term volunteers offer to do a small job for your organization in so that they can "test" the climate and inner workings to judge for themselves if it is a place where they wish to spend their time and energy.

In examining your climate, begin with the understanding that feelings are facts to those who experience them. If a person feels that a group of people is friendly or unfriendly, that is the truth to them, regardless of the perception of others. We all interpret the experiences we have, so that what one person finds very pleasurable, another would find disquieting. Past experiences can play a large role in how we interpret current events, and there is no way for





you to know all the baggage any individual brings to your effort, no matter how good an interviewer you are!

When a new volunteer reports a dissatisfaction with your program or its facets, rather than expending vast quantities of time trying to convince them otherwise, it may be time to take a step back and allow the person to move on to a more suitable involvement. Avoid going on the defensive if someone complains about feeling unwelcome, look at your options for correcting any misperceptions and weigh this effort against letting them go elsewhere. You may be talking to a constant complainer or simply a right person in a wrong setting. You may even have just been given a clue that uncovers a clique which has developed in your program that rejects newcomers and needs to be broken up!

### Dimensions of a Climate

There are four dimensions to organizational climate: Energy, Distribution of Energy, Pleasure and Growth.

These four dimensions are defined by "Norms" or unwritten rules that govern behavior and are impacted most dramatically by how those norms are enforced.

The *Energy* dimension refers to the available energy of the group as a whole. If that sounds a little obscure to you, consider the different energy available within a group of teenagers who work each weekend to help winterize the home of the frail elderly against the energy available from a group of seniors who work to help those same folks with their tax preparation and insurance matters.

Although each may work the same number of hours assisting their clients, the energy levels

are very different. If their job assignments were reversed, we would probably find that the seniors would quickly run out of energy and strength to climb ladders and replace storm windows at about the same time the teens would go crazy sitting still over confusing insurance forms!

When assessing the energy levels available within your volunteer corps, look closely at your demographics, considering age, health, time availability, seasonal demands (do your seniors leave in the harsh winters and your teens work at the mall all summer?), family demands, work requirements, etc.

Time is the new currency and energy the new coinage of our era. Because the demands on people are so dramatic and varied, there is less energy "left over" for volunteer involvement. Typically, people choose their volunteer assignments by how much time and energy it will require. It is critical for you, as the leader of a volunteer program, to honestly assess how much energy will be available to you at any given time.

The *Distribution of Energy* refers to how your volunteers will be asked to distribute or use their energy as they go about their work.

- Will they be empowered to use their energy doing the work assigned, or will other demands be tacked on top of their efforts? Keep in mind that such "tack-ons" can accumulate so that their job becomes "tacky" and gives them a reason to leave, yelling, "I didn't sign on to do THAT!" as they slam the door behind them.

- Are the systems that they must work with enabling or disabling? Do the rules of your program or organization hinder or help them in their work? If you answer in the negative to either of those questions, jump in and repair the basic problems before you lose too many good volunteers.

- Do people have to expend much of their energy simply trying to survive in your setting? Do they have to contend with backstabbing, "one-upsmanship" or silly "games" orchestrated by prima donnas with a massive need for adoration and control?

- Change is inevitable, but is it thrown at people without the benefit of their input or understanding? Remember that people need to be involved in decisions that effect them, and

what they are not "up" on they will often be "down" on! If a decision is mandated from above, at the very least tell folks how it came about, who is the authority requiring it, and why it is to be instituted.

How do people have to spend the energy they bring to their work with you? Constantly work to insure that it is going toward the goal of the effort and not wasted on side issues and efforts that could become reasons for departure.

*Pleasure* in an organization is the least quantifiable dimension of climate, because one person's pleasure can be another person's annoyance. People find pleasure in different ways, often linked to their own personal motivations.

People who are motivated by relationships will look for pleasure among their interactions with colleagues. Such opportunities can be prompted by leadership suggesting ways that volunteers and staff can interact socially through potlucks, retreats, group work assignments, etc. Identify a volunteer who is obviously motivated by personal relationships and ask them to suggest ways that promote interactions. It is easier for people who have grown to know and like one another to work together to get their jobs done! Everyone wins.

People who are motivated by achievement will be most comfortable in a climate that allows them to succeed and quantify that success. They may avoid the socials planned by the affiliators mentioned above, but put in long hours on a fundraising campaign that affords them the opportunity to bring in more money than ever before. Make sure the goals and objectives set before your volunteers can be measured and achieved. Everyone wins.

People who are motivated by empowerment are those who are most turned on when given an assignment that will impact and influence others. These are not folks who use coercive power in the negative, but persuasive power that convinces others to become involved and make a contribution. These people often love to speak to groups or individuals, and though they might attend the socials planned by the affiliators and be pleased if someone added up all the individuals they have recruited to the effort, their real pleasure comes from knowing they made a difference through persuasion and enlightenment. Make sure that there are opportunities to go beyond the confines of the exist-

ing program so that these empowerers can help those outside your circle envision your dreams to the point that they too wish to become involved. Everyone wins.

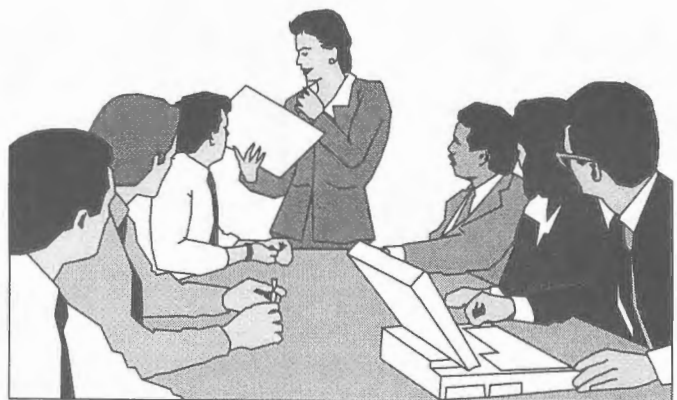
The fourth and final dimension of climate is *Growth*, the perception that through involvement there has been an increase in effectiveness, skills, information or personal enrichment. Everyone wants to feel that they are better, stronger, more enlightened or richer for their experiences, and those in the volunteer world are no different.

Be sure to watch for opportunities you can provide that help people grow or point out how much they have already grown without really realizing it! Growth is a critical factor in the satisfaction level of volunteers, and therefore promotes retention.

I urge you to gather a group of volunteers and paid staff to identify those factors which shape your climate. Also identify the unwritten rules, such as always being on time, dressing appropriately, etc. which play a part in the feel of the workplace.

It is critical to recognize any norms or aspects of the climate that are less than healthy or might discourage involvement, so that plans can be made to get rid or reshape them. Ask people to be candid as they look at the work environment. They may point out norms that are out of date or being enforced too harshly. If a person comes late to an assignment, it certainly demands that those in charge remind them of the importance of timeliness, but not in a screaming, "You dummy!" message in front of clients and colleagues.

An honest appraisal of the climate in which volunteers and staff work is a critical component of volunteer retention.



## The Setting

The physical setting in which volunteers must work should be considered as a key component of retention and satisfaction. You can have every other aspect in order, but if the volunteer does not feel safe at your location, they will most likely leave.

Consider:

1. Is your setting safe? How can it be made safer? If located in a high crime area, what protections can be offered volunteers who venture there? Valet parking? Well lighted areas where volunteers travel, such as staircases, hallways, passageways, parking lots, etc.? Someone to walk with them to and from their cars? Assigning volunteers duties only in daylight?
2. Is your building itself safe? Does it meet all fire and safety codes? Are there planned evacuations that are familiar to all your volunteers in case of emergency?
3. Are volunteers trained in safety in their work assignment, such as handling of anything which might carry pathogens? Are workers familiar with the safe operations of any machines that could cause harm if mishandled? Are they protected from any clients who might cause harm to them? Are allowances made for added safety for any volunteers who are vulnerable or have special needs?

Once again, I would suggest that you gather together key volunteers and staff to help you identify any areas of concern, then take steps to reduce or eliminate such concerns.

Consider also, the importance of making people feel welcomed as individuals in the areas they work. Do you have a volunteer office which is open to everyone and offers a place to rest, hang your coat, grab a cup of coffee, sign in, get supplies, etc.? Look for ways to make the volunteer experience as enabled as possible, through direct support and gentle ways to say, "We appreciate you." A coffee cup with a volunteer's name on it can go a long way to help retain that person.

If volunteers have specific areas in which they continually work, encourage them to appropriately decorate it so that it feels like "theirs" and welcomes them each time they come. A large bulletin board on which they can pin pictures of newborns or recent social gatherings can set the tone of an entire work place.



People tend to stick around in places they have been able to personalize.

## Individualism

The tenth and final factor in retention of volunteers is one that eludes specific definition. It refers to those factors or "baggage" that each person brings with them to the job at hand. To uncover these, you will have to be a cracker-jack interviewer and a continual listener as folks come into your program.

Each of us is an accumulation of experiences, beliefs, assumptions and histories. When rolled together it makes each of us diverse from every other person on the face of the planet. It is that diversity, which reaches much deeper than our education, race, sexual preference, religion or ethnicity, that must be blended into the workings of any organization. It is also the biggest challenge before you as a leader.

From the very beginning it becomes a challenge to choose the acceptance and placement of a volunteer that benefits both the work and the worker. Will this person's skills match the needs? Will they fit with their co-workers? Is their desire to work within your system rooted in appropriate motivations? Will they really help your clients? Can you trust them with their work assignment? All these questions must be answered before you can accept let alone place a volunteer.

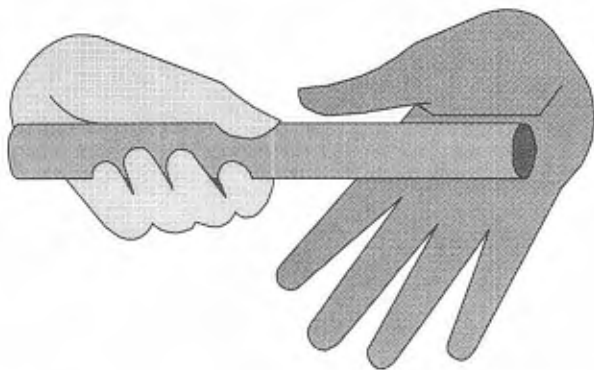
In making such assessments, the following factors need to be examined to the best of your ability. If the volunteer is to be considered for a very high level position or they must work with vulnerable populations or confidential matters, your assessment and inquiry must be thorough and penetrating. Check references. Ask tough questions. Listen to the hair on the back of your neck if something just doesn't "feel right" about the person being interviewed. Keep



digging until you are satisfied.

Here are the factors you will need to consider:

1. *Expectations.* What expectations does the volunteer bring to the position? Are they realistic?
2. *Time constraints.* A person might have the skills to do a specific job, but do they have the time?
3. *Skills.* What skills does a person have that might fit a particular need of the program?
4. *Adaptability.* How rigid or flexible are they? The more rigid a person is, the less likely they will be able to shift when change is demanded, so their satisfaction may decrease.
5. *Wellness.* This refers not only to physical wellness, abilities or limitations, but their emotional wellness too. How balanced is their life? Are they mature and stable? Do they have an agenda that could cause a problem to you or others with whom they work? I've seen many a volunteer director ready to tear their hair out over a "single issue" volunteer who wants the organization to follow her fanaticism.
6. *Experience.* What experiences, either in paid or volunteer work, does the person bring to your program? Matching people with jobs that allow them to use their experiences and that they have enjoyed in the past will most likely increase your retention rate.
7. *Commitment.* Show me a volunteer who is committed to your cause and I will show you a person who will be around for quite a while, and after leaving is still an advocate for you to others! When a person is driven by a personal commitment to a vision or effort, they stick around in spite of bumps in the road, goofy systems or personnel problems. They keep their eye on the outcomes and forgive errant



behavior to a certain extent. If given the choice between a committed neophyte with lots to learn versus an uncommitted expert, I'll take the former every time!

8. *Needs and motivations.* This gets into tricky territory, as all of us have needs we bring to our efforts. If those needs are normal, and if the motivations are sensible, you should have no problems in placing and keeping volunteers who carry them. If, however, they are out of line and are the main focus of the person, you won't want to retain them! Beware the super-needy woman who says she is there to help the patients in the hospital, but is really looking for a new group of people to minister to her own needs and attend her regularly scheduled pity-party!

"Woe-is-me Wanda" is not a healthy addition to any group any more than the gentleman who felt passed-over all his working life and has joined your group so he can exercise his "Attila-the-Hun" interpersonal style!

Such people are part of the last category of individualism that needs to be examined:

9. *Self-image.* Does the person wishing a volunteer assignment have an accurate and healthy self-image? Are they confident or unconfident? Are they self-assured or so afraid of failure that they will require constant reassurance and never act independently? Do they have the skills they think they have or will they probably get in over their head?

All of these factors are really intertwined in the package each of us brings to anything we do. It becomes a part of the retention question, because, to put it bluntly, there are some folks who you not only don't want to retain, but you don't even want them involved. Sometimes that is because their talents would be wasted in your program. Other times it is because they simply would not "fit" with existing volunteers because their differences are too great, and still other times it might be because they could pose a danger to your clients.

The individuality of volunteers, when mixed together appropriately, becomes the strength of our efforts. The diversity weaves a stronger cloth than having too many people exactly alike. It becomes one of the greatest challenges we have as leaders, to blend this diversity and individualism into a cohesive, effective amalgam of people working toward a shared

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goal to the benefit of everyone.

## Conclusion

The retention of volunteers is probably the greatest challenge of the volunteer program manager. The effort to get volunteers pales in comparison in many instances to the effort to keep them. Good screening and placement are the first steps toward sound retention followed by setting the framework in which people feel satisfied, productive, welcome and rewarded.

The last tip I would offer in dealing with retention, is this: Part of retention may be knowing when to let folks go so that they leave with warm feelings about their involvement with you and tell others in such a way that those others become part of your volunteer family.

I would rather than you had volunteers for shorter times who went on to advocate for your program and came back, off and on, through many years, than the person who comes for several years, burns out and leaves with a bad taste in their mouth.

As this century progresses, we may redefine retention to include those folks who leave your direct services but stay emotionally attached and speak highly of you to others. With such a broadened definition, every satisfied volunteer can be counted as "retained" and therefore "maintained to keep in one's service."



# Critical Incident Points in the Volunteer Life Cycle

Most studies of volunteer motivation have concentrated on examining the factors which will influence the decision to initiate volunteering. These factors are complex, as Miller notes: "a volunteer's involvement and satisfaction derive from a complex combination of the volunteer's personality, the nature of the volunteer activity, and the nature of the volunteer's other activities." These studies, however, are not particularly useful in then determining what factors might influence that same volunteer's decision to *continue* volunteering with that organization. This deficiency arises because initial motivations can be quite different from subsequent attitudes and behaviors, which are based on a wide variety of factors. Paul Ilesley in his invaluable series of interviews with volunteers found that:

*"Inexperienced volunteers, defined as those who have been in service for less than six months, usually can explain their reasons for volunteering without hesitation and can describe tangible ways in which they expect to be rewarded for their work... Experienced volunteers, by contrast, sometimes have difficulty explaining why they continue their work. A volunteer who had worked at a museum for fifteen years says, 'I've been here so long I can't remember why I stay.'"*

This situation is further complicated by the fact that the volunteer's motivations, reactions to their volunteer work and adjustment to other life factors will tend to change over time. Each of these changes can create a re-examination by the volunteer of their commitment.

Over the length of a volunteer's relationship with an organization there will tend to occur numerous critical incident points at which the volunteer will review their decision to remain as a volunteer. These points seem to have some predictability, both in time of occurrence and in the content of the factors that will influence the volunteer in either leaving or staying, but are often ignored in studies of volunteer motivation. Robert Dailey, writing in 1986, noted "researchers need to recognize there is a wide range of behaviors and attitudes that materialize and drive volunteer activity well after the decision to join and donate

energy and time have been made."

This article reviews these critical points and suggests ways for a volunteer manager to positively influence the volunteer's decision during this process of self-examination.

## Initial Contact

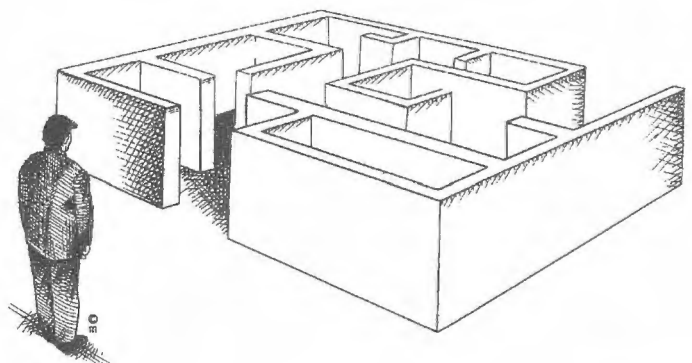
Often the opinions of a volunteer are shaped in the very first instance of contact with an organization. Examples of this initial contact might include:

- initial call to an agency about volunteering
- first meeting or interview with volunteer manager
- orientation session
- first day on volunteer job

During each of these moments, the volunteer is forming opinions about whether the somewhat risky move they are considering (offering themselves to a strange organization) is a wise choice. At this point, any feeling of discomfort is likely to be magnified in the mind of the volunteer, and any sense that the agency is indifferent or uninterested is highly likely to result in the volunteer ending the relationship as quickly as possible. At this early and quite fragile point in the relationship, the potential volunteer is highly attuned to any signs of welcome or of rejection.

Here are some suggestions for maximizing the likelihood of a volunteer getting a positive first impression:

1. Make sure that those answering the phone for your organization know about the volunteer program and project an organized



and friendly attitude to callers asking about volunteering. All of those who first meet with a potential volunteer should project a sense of welcome and appreciation. As someone once noted, "You never get a second chance to make a good first impression"

2. Make sure that you get back to those who call about volunteer opportunities as quickly as possible. There is a substantial decay factor in volunteer enthusiasm over small amounts of time, and this decay can quickly lead to a firm conclusion that the agency isn't really interested. If you're too busy to process the volunteer's request, then at a minimum call to let them know you'll be back to them later and tell them when you will be re-contacting them.
3. When first meeting people, strive to give them a sense of understanding of the process they will be going through in applying to become a volunteer. This is especially important in these times when background checks can consume weeks. A volunteer who feels "lost" during this initial phase will quickly become lost.
4. Strive to give the new volunteer a sense of inclusion, establishing immediate social connections with staff and other volunteers. One simple way to do this is to walk them through the agency and introduce them to others, particularly those with whom they will be working.
5. Make the volunteer's first day on the job a ceremonial one, with an official greeting and thanks. This will tend to put the organizational seal of approval on the volunteer's decision.

## First Month

During their first month on the job, the volunteer is learning about the position to which they have been assigned. A volunteer manager should always view this initial matching as a hopeful but occasionally incorrect experiment, commonly based on a relatively short interview in which each participant is operating with a great deal of ignorance about the other. The primary factor influencing the volunteer during this critical time is one of "job comfort," i.e., do they feel capable and interested in the work now that they are actually learning what it is really about? Reality has replaced the job



description. A volunteer who discovers that the position to which they have been assigned is not one in which they feel comfortable will start to disappear.

A smart volunteer manager can easily control any danger during this period by deliberately scheduling a "review interview" about 30 days after the initial placement. This interview, arranged at time of initial placement, is explained as an opportunity for the volunteer to really decide whether they like the job or not. The first month basically operates as a "test drive" for the volunteer to be exposed to the actual work and to determine whether they are comfortable with their ability and interest in continuing in that position.

While this creates some additional work for the volunteer manager it creates the ability to "fine-tune" placement decisions, based both on the volunteer's new knowledge about the work and the agency's new knowledge about the volunteer.

As every experienced volunteer manager knows, making a "perfect match" in placement is essential for smooth working relationships.

## First Six Months

During the first six months the volunteer has an opportunity to examine and consider their developing relationship with the agency. Critical factors include:

- *Reality versus expectation.*

Does the situation in which the volunteer is now engaged meet their expectations in a positive way? Is the volunteer getting what they thought they would get out of volunteering? Is the volunteer work vastly different from what they thought or what they were told during initial orientation and

training? Do the clients and work environment meet the expectations of the volunteer?

*Job fit.*

Do the overall aspects of the job (client relations, work process, etc.) match with the volunteer's interests and abilities? Does the volunteer feel equal to the work and capable of achieving some success at it?

*Life fit.*

Does the volunteer work and its time and logistical requirements fit comfortably into the rest of the volunteer's life, work and relationships? Is the volunteer work too demanding or too intrusive?

*Social fit.*

Does the volunteer feel like they are becoming an accepted part of the organization's social environment? Do they feel respected and a part of the team? Are they finding friends and colleagues?

Possible solutions for helping a volunteer reach a positive conclusion during this period include:

1. Create a buddy or mentor system for new volunteers. These assigned colleagues will assume responsibility for answering any questions the volunteer has, helping them with their new roles, and introducing them to the social fabric of the organization. Experienced volunteers make excellent buddies. Note, however, that being a buddy is different from being a supervisor. The role of the buddy is primarily to help the new person become comfortable, not to manage them.
2. Assume that you (or their supervisor) will need to allocate more time for communication with new volunteers and schedule yourself accordingly. Don't assume that the volunteer will come to you; instead, create opportunities to talk with the volunteer, even if it's just a "social call."
3. Schedule a 6-month review. This is not so much an evaluation as it is a chance to talk with the volunteer in a formal way about how they are feeling and whether they are enjoying themselves. If you have assigned the volunteer to work with a staff supervisor, this review is an excellent opportuni-

ty to see how that relationship is developing.

4. Give the volunteer symbols of belonging to the organization. This can include a business card, their own voice or postal mail box, clothing and equipment, etc. These will tend to reinforce the notion of the volunteer that they are a part of the organization.

## First Anniversary/End of Initial Term or Commitment

This is one of the most serious critical incident points, because the volunteer will have fulfilled their initial commitment and now must make an affirmative decision to renew that commitment as opposed to seeking a new volunteer opportunity.

Key factors for the volunteer at this time are:

*Bonding.*

Has the volunteer developed favorable personal relationships with others in the organization? Does the volunteer have friends among other staff and volunteers?

*Accomplishment/Expectation.*

In reviewing their tenure, does the volunteer feel that they have accomplished what they thought they would accomplish during the job? Does the volunteer feel successful, or do they feel that they have "failed" to achieve what they wanted, either in serving the community or helping a particular client?

*Opportunity for growth.*

In contemplating continuation of the volunteer work, does the volunteer look forward with anticipation or do they feel that the work will simply be more of the same?







Does the volunteer feel that they have the opportunity for continued challenge in the job or does it appear boring?

Here are some management actions to assist a volunteer at this stage:

1. Develop a "volunteer growth plan" for each volunteer. This plan, developed with and by each volunteer, will chart out how the volunteer is feeling about their work and what might be done to re-ignite their interest if it is flagging. .
2. Celebrate the volunteer's term of service, finding a way to show them what they have accomplished and how they are appreciated. Have testimonials from those with whom they have been working and examples of their accomplishments. Do not make the party seem like you're giving them the gold retirement watch; instead make the theme "Many Happy Returns."
3. Make sure the volunteer has an opportunity to see the results of their work and of the overall work of the organization, preferably in a face-to-face encounter than conveys the real impact. A 1990 study of crisis center volunteers found a substantial difference in average volunteer tenure in centers where volunteers had opportunities for face-to-face interventions with clients over those where the volunteers had little client contact. Always remember that the ultimate impact on the client is part of a volunteer motivation, and it is difficult to feel motivated when you never know the results. Organizations which engage in outcome-based evaluations should be sure to inform volunteers about the results of these evaluations.

4. Strengthen the bonds of the volunteer to the organization by giving token items which symbolize "belonging." These can include a photo album of them working with others or mementos of past work.
5. Talk frankly to the volunteer about whether they are still enjoying their work. Many volunteers will be reluctant to tell you this, either out of a fear of seeming to let the organization down or a fear of seeming to criticize those with whom they work. Strive for an understanding with the volunteer that this discussion is not about "failure," but about "renewal," an opportunity to be even more successful in the future.
6. Be prepared with a number of different options for the volunteer which can serve to re-ignite the sense of excitement they once had. These might include a change to a new position, a "promotion" in their current position, or even a sabbatical to step aside from their volunteer work and gain a new perspective or just a feeling of re-energization. Volunteers can easily be "promoted" by giving them additional responsibilities such as assisting in training other volunteers, serving as mentors or resources, etc.

## Longer Term

In the longer term, individual volunteers will face additional critical incident points. These are not always predictable, occurring at different times for different volunteers. Here are some of the factors that will create these incidents:

### *Job Adjustment.*

If the volunteer's job changes in any substantial way. This could include a change in the client to whom the volunteer is assigned or a change in the staff with whom the volunteer is working. It can very often include a change in the status of some other volunteer with whom there is a close attachment.

### *Life Fit.*

As the volunteer ages, their own life and needs will change. Critical change points include birth of children, change in paid work, marriage, death of spouse, retirement, etc. As Pearce noted in 1993, "Volunteers may quit because of personal changes, such as moving or returning to work or school. Since volunteering is often

viewed as a peripheral activity, it may be influenced more heavily by outside events than employment is." A volunteer manager should stay attuned to how the volunteer's own life is going, since major changes in it will create critical examination of the volunteer's involvement with the agency.

Two strategies are crucial in ensuring that volunteers remain committed during these changes:

1. *Giving volunteers a sense of empowerment in shaping their volunteer work.* If volunteers know they can discuss their work and have the opportunity to redesign it to fit a changing situation, they are more likely to remain.
2. *Making each volunteer a "true believer" in the cause of the organization.* Perhaps the greatest factor in volunteer retention is the extent to which the volunteer truly believes in the work being done by the organization. Volunteers who initially join for other reasons (social factors, job experience, etc.) should be deliberately engaged in conversations about the need for the agency and its work.

A 1995 study of volunteer ombudsmen revealed that this last factor has major importance. As they noted: "Because organizational commitment is based on volunteer attachment to organizational ideals, a volunteer program manager must take great care to communicate the organization's philosophy. It is the essential, inspiring vision that binds the program's character, social role, goals, and objectives to the volunteer's self-image."

While the above may seem like additional

work, they are designed to allow the volunteer manager to concentrate on an essential task - retaining good volunteers. It is expensive and time-consuming for an agency to always be recruiting new volunteers. To determine whether you need to pay more attention to volunteer retention you might consider keeping retention statistics on your volunteers, and, in particular, graphing the approximate timeframe of their points of departure. If you begin to see clusters of departures around the timeframes above, then improving your statistics can be a simple task.

In essence this process requires looking at your volunteers on a longitudinal basis, remembering that, like all of us, they are likely to grow and change over time. Since volunteering depends upon meeting both the needs and circumstances of the volunteer, it makes sense that volunteer management will need to adjust to changes in those needs and circumstances.





# The Role of the Leader

In the author's combined experiences of over 40 years of working with programs that epitomize the best practices, nothing stands out more clearly than the fact that best programs are the result of best leaders.

The proof of this often comes from many once-great programs falling into disrepair after the departure of a truly great leader, in spite of that person's efforts to groom and coach others to carry on successfully. The sad disrepair often happens because:

- Times change and doing things exactly as they have been done before will not guarantee success.

- When anyone, especially the leader, withdraws from a work circle, the dynamics of the circle changes, requiring different responses and efforts.

In trying to learn from the best leadership practices we encounter, we can only note their characteristics and adopt those that fit the circumstances we find around us.

## What Leaders Do

In working toward success, leaders typically:

1. *Look at and become familiar with the trends that surround them.* They then adjust responses to these trends, remaining flexible as new information, resources and people come on the scene.

2. *Have a sense of purpose:*

- a. They have a clear mission, which is articulated in goal statements.
- b. They simulate followers to action.
- c. They draw mental pictures of positive outcomes.
- d. They involve those to be effected.
- e. They plan strategically, especially around potential areas of conflict.
- f. They can make others "see" their visions which pictures a better future and common good; generates excitement; accepts risks; overcomes resistance to change and encourages creativity.

3. *Establish values which guide behavior:*

- a. decided on by those who will do the work.
- b. communicated to everyone for internalization.
- c. helpful to guide those who must make decisions.
- d. the basis for the measurement of success.
- e. based on high standards and good work habits.
- f. able to be adjusted for change.
- g. helpful in designing appropriate roles for others.

4. *Create systems, which allow people to move toward the successful realization of the mission or goal.* These systems:

- a. Avoid barriers and cumbersome processes.
- b. Are as simple as possible.
- c. Can be adjusted at any time someone suggests a more effective design.
- d. Are designed and honed by those involved.
- e. Allow the leader to keep people moving toward the goal with no detours!
- f. Help everyone see where he or she fits in the whole scheme.
- g. Promote ownership by workers.
- h. Allow for honest delegation of responsibility and authority that then has the leader stepping out of the way!
- i. Allows the leader to empower others.

5. *Motivate those around them:*

- a. They understand how motivational theories give us clues into the needs and wants of workers such as those found in Fredrick





Herzberg's "Motivational Theory", David McClelland's "Motivational Classifications", Abraham Maslow's "Hierarchy of Needs", Victor Vroom's "Theory of Expectancy" and Inamura's "Theory of Significance." All offer clues as to how volunteers and paid staff can be motivated.

- b. Top leaders are familiar with such learning mentioned above and use the information to stimulate and encourage. They do not, however, label people indefinitely, because they realize that everyone changes, and indeed, people can have different motivations in different segments of their lives and at different times of their lives.
  - c. They regularly attend to issues of esteem, safety, achievement, growth, control, affiliation, pleasure, climate and significance.
  - d. They understand that good management is the best foundation for positive motivation, and conversely, that poor management often results in de-motivation and departure.
6. *Understand that their role is to:*
- a. Reward good works and attitudes.
  - b. Identify key players who motivate and stimulate others.
  - c. Offer new challenges.
  - d. Frame missteps as opportunities to learn.
  - e. Empower others and then let go.
  - f. Develop teamwork.
  - g. Remain positive.
  - h. Insure all the various parts of the effort are moving toward the greater goal in a coordinated manner.
  - i. Get the facts of any conflict; then back their workers to others or remediate problems as the circumstances dictate.

Outstanding leaders, especially those who must be "super-leaders" who oversee subordinate

leaders under them, understand that the most successful efforts are achieved when others take ownership of an effort and work in teams to make the dream a reality. These workers must see the super-leader as a visionary, coach, mentor, cheer leader and navigator toward the goal. They must trust such a leader and feel supported at every step of the way. Effective leadership is not an easy task, but it is worth all the effort it demands as dreams come true for everyone involved!

## A Leadership Checklist

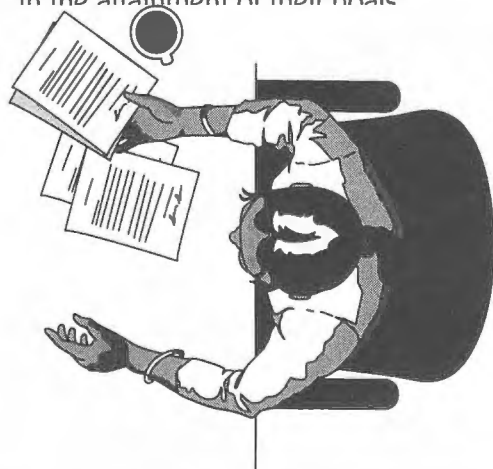
Leadership is the common denominator that runs through all outstanding volunteer programs, regardless of their specific goal or client base.

The following characteristics are predominate in great leaders and can serve as an informal checklist for those of us aspiring to be the best leaders we can be.

Leaders:

1. Have dreams of how things can be better.
2. Allow time for incubation of their dreams so that they are shaped clearly.
3. Take time regularly to dream of what "could be" in a positive way, without getting stuck on the way things are and only lamenting reality.
4. Mentally rehearse the positive outcomes they want.
5. Mentally rehearse responses to things that could possibly go wrong and create contingency plans should these responses be needed.
6. Accept the fact that sometimes one has to simply live with consequences that cannot be changed. Under such conditions, they shape their responses as positively as possible.
7. See problems as opportunities for new solutions.
8. Are able to communicate their dreams and visions to others that is understandable to them.
9. Have multiple options or paths for their dreams and visions.

10. Are flexible and can devise new ways to accomplish their dreams should their first plans be blocked.
11. Can translate their dreams into specific and attainable goals and objectives.
12. Can enthuse and inspire others to action.
13. Can spot others who can be successful in carrying out specific jobs needed to attain dreams.
14. Are able to juggle all the things that need to be done to attain the dreams – physically, mentally, and emotionally.
15. Are not easily discouraged.
16. Can set aside other, less important efforts to focus on making the dream a reality.
17. Have the energy needed to make the dream a reality.
18. Have the time to devote to their dreams
19. Can "play" with ideas.
20. Do not feel a need to only stick to ideas of their own design. They invite and incorporate those of others, knowing that that will make the efforts stronger.
21. See conflict as a creative energy rather than a negative. They know how to handle conflict, build on its energy and redirect it to positive outcomes.
22. Can sort through superfluous efforts and focus on what's really important.
23. Can spot ideas in other situations which, through transfer of learning, can be useful in the attainment of their goals
24. Are conscious of their own "rhythm" of working so that they use their best times for productive output.
25. Are conscious of how they work best: alone, with a few trusted others, with a larger group or a mix of all of these settings.
26. Delegate honestly and let go of any need for total control.
27. Understand that the more ideas of others that are incorporated into an effort, the stronger the end result will be and that more champions will be available to "sell" any changes to others.
28. Understand that the ability to adapt to change is critical to success and impact.
29. Do not shy away from confrontation and the positive use of power or clout.
30. Never betray confidences or speak critically of an individual. When problems arise, the work is the focus, not the person. They avoid "negative-you" messages.
31. Celebrate success on a continual basis.
32. Learn from "mistakes," thus turning them into growth-stimulators.
33. Know when to let go.
34. Know when to leave.
35. Persist, yet appreciate the value of right timing.
36. Keep their own life in balance.



The question will remain unanswerable through the ages of whether leaders are born or made, but we can learn from the best of the best by identifying those characteristics we find inherent in their behavior.

### **The Attitude of Leadership**

Attitude is the framework of all we do. Work can be done perfectly but if it is done with a nasty attitude of bigotry, superiority, or antagonism, neither subordinates nor peers will be as productive as they could be and wise volunteers and staff will exit ASAP! Who could blame them?

Consistently, when examining outstanding

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programs, we find that the attitude of the leader sets the tone of the workplace and is highly contagious.

Here are some best practices of top program directors from which we can all learn:

1. *Their attitude of fairness is constant:*

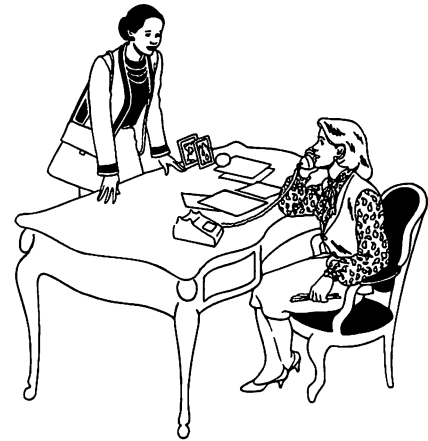
- a. Everyone is treated equally; no "caste system" is in place.
- b. Rules are applied to everyone. No one is exempt.
- c. Everyone is valued, regardless of their position, designation (i.e.: volunteer/paid staff) or responsibility.
- d. No one is judged by his or her individuality. "If it doesn't matter, don't let it matter" is the rule of thumb, so that the longhaired teenager or the uneducated adult is not rejected by assumptions that they have nothing to offer.
- e. They do not have "sacred cows"- untouchable areas within their efforts that cannot be questioned or changed.

2. *Negative thinking is avoided:*

- a. Exceptional leaders understand the subconscious power of negative self-fulfilling prophecies. They know that if people begin with an attitude of "this is impossible", it probably will be! They adopt a positive attitude of "can do" and instill it in others.
- b. They identify any Ehores or Dooms-Day merchants in their ranks. They try to change those attitudes, but if they cannot, they either remove the negative thinkers altogether or make sure they are not in a position to contaminate others.

3. *They are legitimate:*

- a. They have high standards and display them in all they do.
- b. They demonstrate appropriate behavior and never allow themselves to be put into a position where their conduct could be questioned or maligned.
- c. They can hold others to high standards because they demonstrate them themselves.
- d. They are congruent: their actions are in line with what they say.
- e. They admit their mistakes and never try to cover up.
- f. They are not pretentious. They never



- g. believe their own press clippings!
- g. They understand that they are human and can have off days. They do not equate legitimacy with perfection.
- h. They do not pretend to be something they are not. They have no desire for self-grandisement. They share credit with others with a genuine conviction that they alone are never the reason for success.
- i. They never keep score, keeping track of favors they do for others versus the number returned.
- j. They care about others and show it appropriately.
- k. They are passionate- about their cause, their work and their co-workers.

4. *They are flexible:*

- a. They understand that there are many ways to accomplish goals and do work. They are willing to try new routes to old assignments.
- b. They encourage change when it can lead to greater success.
- c. When change is forced on them and all appeals are useless, they adapt and also help others to adapt.

5. *They are creative and encourage creative thinking in others:*

- a. They think "outside the box."
- b. They avoid statements and stances of "but we always", "but we never."
- c. They rehearse new ideas mentally, weighing outcomes, impacts and consequences.
- d. They reward creative thinking in others.
- e. They provide ways for everyone to submit ideas for consideration.

6. *They are life-long learners:*

- a. Their attitude is open and curious about new thoughts, processes and information.

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- b. They encourage people to explore and introduce new thoughts. They use brainstorming techniques to draw out new thinking.
  - c. They see challenges to their thinking as an opportunity to strengthen or abandon opinions and do not take them as personal attacks.
  - d. They read and speak to many diverse thinkers and do not discount all of what is presented because of a disagreement with a small part.
  - e. They believe they can learn something from everyone they meet and every situation they encounter.
  - f. They believe that problems are not failures if they can learn something from the experience.
  - g. They look for learning in all of life's encounters and do not limit themselves to exploring only their own field or interests. They know that a truly great "ah-HA!" can come from anywhere.

When truly outstanding program leaders implement their best practices, they bring to their work an attitude that is balanced, practical and powerful.



# First Among Equals: A Guide to Leading Your Former Peers

Going from being "one of the gang" to being "the boss" is one of the most difficult transitions in management. This transition can occur when:

- You're promoted to a higher level in your program or agency, one which places you in a supervisory role over others, particularly when you used to be a co-worker to these people.
- You're a volunteer who has been asked to "manage" other volunteers or even to coordinate the entire volunteer program. Many of your neighbors also volunteer for the agency.
- You're a member of a group who has been elected to a leadership position, such as an officer or a committee chair. You've recruited some of your best friends to serve on the committee with you.

In each case, the nature of the relationship between you and other people has just changed, and changed dramatically. The Latin phrase for this is *primus inter pares*, "first among equals," implying the new difference in status and power that has emerged. In some ways, the greater the degree of friendship you had with your former colleagues the more difficult the transition will be.

Difficulties will occur both for you - the promoted person - and for your former peers. Each will have to adopt to a new way of relating to one another which takes into account the new reality - one person now has some authority and responsibility over the others and over coordinating the work that the group will seek to accomplish. You have become that most reviled of individuals: "The Boss."

Here are some tips for making this transition go more smoothly and successfully:

1. *Begin cultivating support before you're selected for the position.* Make your intentions known, and discuss your plan with your friends. Trying to advance in the world is nothing to be ashamed of, nor is having talents for administration that can be of

value to the organization. One of the worst things that can happen is to "surprise" your friends with a sudden rise in position. You'll catch them off-guard and make it look as if you were abandoning them without notice. If you yourself don't know until the last moment about the promotion (because you aren't asked to apply but are simply offered the position), ask for time to consider the offer and use that time to talk with friends and colleagues.

2. *If there is a selection process for the position, try to find out everything you can about it, both before applying and after you have been selected.*

Your position will be easier if the selection process has been "fair" - if everyone was encouraged to apply, if there was equal weight given to all applications, if a real effort was made to find the most-qualified candidate, etc. When you have been selected, ask why you were chosen. You may be able to use this information to explain to others why you and not they were picked. You should also try to find out who else in your department or group might have applied for the position.

3. *Recognize for yourself that you are about to face a change in position, with a different kind of responsibility.*

You are not abandoning your friends and colleagues, but you will be relating to them in a somewhat different fashion. You are now responsible to the organization for managing the efforts of this, and this may occasionally





not mesh perfectly with your obligations or relationships with your friends. You will need to consciously make a decision about how much "space" or "distance" you will keep from your former colleagues. Talk to other supervisors who you respect about what works for them. You will also need to find out the "style" at your organization - does everyone operate informally as equals or is there in fact a hierarchy? You may not choose to operate yourself according to the "culture" of the agency, but you should know enough to determine what it is before you develop your own style of relating to others.

4. *The most important time period for new managers is the first week in their new position.* Even if you already know the people involved, you will still be making a "first impression" on them at this point. How you act toward them and how you structure your interactions will mold the relationship that develops. Their uncertainty will be very high at this point, so you will particularly need to clarify roles and expectations, both as a group and in individual meetings. Call a meeting of your new "staff" as soon as possible after your promotion - on the first day if possible.

At the meeting, let people know your own feelings about your promotion, outline your ideas about the goals and objectives the group will be working on, and present your expectations regarding any changes that you anticipate. If you will be operating with a clearly different style from your predecessor, let people know your preferences. Be careful about announcing too many changes at this first meeting - it will be better to give yourself time to talk individually to your group and solicit their opinions as well about what needs to be changed.

If you suspect there are hard feelings, invite discussion of the subject. Look for non-verbal signals that some people are not happy with the situation and privately invite these people to share their feelings and concerns with you at a later time. Do not, however, apologize for being placed in charge. You'll need to believe that you're the right person for the job in order to make others believe it as well. This does not mean attempting to look infallible or all-knowing - there may be people who are much more knowledgeable about some areas than you in the group, but your skill will lie in helping these people make the best use of their knowledge and talents.

5. *Arrange individual meetings with each person in your unit to talk about their work.* Ask for their input regarding what needs to be done and how you can be of help to them in their work. Ask them how they see themselves best making a contribution to the group. Note that you will be relying on them for their expertise and their support. Let them know how you like to be communicated with and ask them how you can best communicate with them. If they have had a special position or responsibility, talk with them about how they will be continuing with this role. Remember that many of these people will have experienced a comfortable working relationship with your predecessor that has now disappeared, so you may expect some fear and uncertainty on their part.

6. *If you do encounter someone who remains resistant to you, confront them privately and directly.*

Let them express their feelings, but then let them know that the time for discussion is past and the time to work together has arrived. Ask them how they see things working out successfully and what they are willing to do to make the new relationship work. Note that any continuation of complaint or reluctance on their part damages the work effort of all and will not be allowed to continue. One way to give them an option is to ask whether they would like your help in being "transferred" to some other unit or your suggestions for another agency in which to volunteer.

7. *Adjust your behavior to match your new position.*

Make sure that you are equally fair to all, and especially to those with whom you were in competition. Being "fair" means neither treating them too harshly nor too well. If you have been closer to some colleagues than to others,



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you will need to make sure you pay equal attention to those who weren't your friends. As a supervisor you have an equal responsibility to all and cannot appear to play favorites. This appearance of fairness can be reflected in little behaviors - who, for example, do you have lunch with? Who do you give the "best" assignments to? Who spends more time in your office?

8. *Involving others in discussing and making decisions is a good supervisory technique.* Be aware, however, that in your early days, others will be watching to see *how* you involve the group in making decisions. They will attempt to determine whether you want and listen to input, whether you value ideas that may run counter to your own, how you deal with opposition and whether you are willing to face and make tough decisions.

You must find a way to involve others, but you must also show your own willingness to take a stand and even to make an unpopular decision that needs to be made. Too accommodating a decision-making style can be as ineffective and as unpopular as a too dictatorial one. One of the reasons that groups have leaders is to have a person willing and able to make difficult decisions when the group is unwilling or unable to reach consensus. *You can't be a leader if you won't lead.*

While renegotiating your relationships with your previous peers, you should also remember that you are entering into a new set of relationships with others as well. You must also be developing a relationship with your new "peer" group, the other leaders in your organization. These are your new co-workers, with whom you must coordinate the work that you are doing and with whom you must jointly plan the management activities. Many of the steps suggested above can be adopted and applied to cultivating a working relationship with other managers.



# Surveying and Responding to Change

Through the approach and start of a new century, much has been said about change. All of us have been bombarded through the visual and print media with predictions that focused on how much change we would encounter personally, professionally, economically, and technologically.

Is it any wonder that many of us stepped into the year 2000 with a worried look on our face and a constant question of "what's next!" on our minds?

Obviously, change is a constant condition in our lives, both at home and at work, but I wonder if we have become so accustomed to adapting to change that that has become TOO much of our focus.

What if we all took a step back from the constant expectation of change and looked at life from a different perspective? What if we could find a way to really judge the necessity and impact of change by casting it in a different light?

What if, instead of focusing so intently on what needs to change, we focused instead on what should stay the SAME? Bob Greene, a columnist for the Chicago Tribune triggered my thoughts along this line when he wrote about a grammar school group which asked its five year olds what they hoped would never change. The answers were charming and included such "please-don't-change" items as blue sky, green grass and birthday parties with friends.



If we were to use this same exercise within our own volunteer programs, the responses might not be as charming or simple as these youngsters', but they could be as revealing.

I suggest, therefore, that you consider asking your volunteers and paid staff within your program to list the things they hope would NOT change. Hopefully, such an exercise will help you identify the most pleasurable facets of your efforts. You might expect answers that mention awards, banquets, direct benefits (parking, meals, insurance, training, etc.), camaraderie, recognition, personal satisfaction, etc.

Obviously, such surveys would need to be carefully worded so that responders do not believe that by sharing their opinion on what should stay the same they have protected those choices from change.

From compiling such responses you may also get a clear picture of what is most valued by the volunteers and staff, thus indicating what they perceive to be the greatest benefits of involvement in your program. You would then have an ability to rank these benefits, possibly using them in future recruitment appeals, long and short-term planning and even resource development.

I believe it would also be beneficial for you, as the program's chief executive, to see the perceptions held by volunteers and staff. Are they similar? What values do volunteers and staff share? Are there any that might conflict?

To broaden the concept of identifying what people hope will stay the same, you might consider also asking those people who interact externally with your program, such as clients, support staff, organizational workers and even donors and the general public. This would certainly help you uncover public and "outside" perspectives regarding what services your program offers, where you "fit" in the community, and what your mission is.

Think about all the information you would have should you undertake such a unique effort. From those most closely involved, such

as the program volunteers and staff and extending out to the general public, you might have a better understanding of:

1. What things you do that are very, very important to those who make your program work.
2. What efforts, facets or attributes volunteers, staff, and clients expect.
3. What things within your program are so important as to be "sacred cows": those efforts or facets that are so significant that changing them would cause terrific upheaval.
4. What public perceptions exist about what you are and what you do that is good and should remain constant.
5. What efforts or characteristics COULD be changed without too much turmoil? This insight would come from understanding the importance of what is NOT listed on the "please-don't-change" list!
6. What clients or external staff consider most valuable as they tell you what they hope will not be changed. A hospital nursing staff, for example, might indicate that they hope the positive attitude toward helping would never change, thus telling the Director of Volunteer Services that she has been successful in convincing staff that volunteers can help, rather than hinder, their work.
7. What donors and supporters believe are the best attributes of the program services. This information gives you indications of how to tailor appeals for funds, friends and general support.

If you believe that such surveys of what should stay the same in our changing world is not "scientific" enough, please read between the lines in the points made above, understanding that they are all grounded in solid research:

The importance of Point #1 comes from understanding David McClelland's Motivational Classifications, which identify primary motivations of Achievement, Affiliation and Empowerment.

· If, for example, 80% of the responses from the program volunteers indicate a "please-don't-change" response around sociability, the preponderance of the volunteers are expressing Affiliation motivations for their involvement.



· If 80% indicate a desire to keep work that makes a great difference in the lives of the clients or community, you have mostly Empowerers working with you.

· If 80% of the responses about keeping specific aspects point toward measurable achievements, you are leading a group of Achievers.

Such information would help you plan future efforts successfully and be more cautious about changing things that reflect the majority's deepest interests. It would be my hope, by the way, that you would have a mix of all three types of motivated volunteers and staff, because such a mixture helps programs find success through balanced perspectives and efforts.

The importance of Point #2 comes from understanding Victor Vroom's Theory of Expectancy, which tells us that what people EXPECT is critical to feelings of trust and success. If a person expects that fellow volunteers and workers will be friendly, creative and helpful to them as a newcomer to the group and they do NOT find this to be true, they will feel let down, somehow cheated and probably go elsewhere with their volunteer energies. Knowing what people expect is critical to volunteer retention.

Point #3 is helpful because it is grounded in the work of a Japanese Suicideologist, Dr. Inamura, whose Theory of Significance tells us that when people feel their significance is threatened they will go to extremes to keep it protected. His research proved that in the most extreme cases, when a person feels they have been robbed of their significance, they often choose to leave, give up, or, sadly, even commit suicide to escape their conviction that

they are no longer valuable.

I am not suggesting that if you must change something your volunteers feel is significant that you will have mass suicides, but keep in mind that groups adopt characteristics much like individuals. Therefore, when a group such as a hospital auxiliary believes its significance is tied into the operation of the gift shop and then hears that it will no longer be allowed to manage or staff the shop, it is not surprising that it can fall apart and decided to disband. In effect, the auxiliary is deciding to end its existence because it cannot imagine continuing without its identifying significance, the gift shop.

Understanding what volunteers, staff or others consider most significant is a valuable tool in maintaining harmony, planning more carefully for necessary change and pinpointing individual's most emotionally sensitive areas.

Points #4, #6 and #7 speak to solid marketing research that tells you what points are most appreciated by the supporting and general publics. My own books on marketing as well as those by Philip Kotler, urge program leaders to constantly take the pulse of their publics to insure that what is being provided is continuing to meet the needs of consumers. When people tell you what they want to stay the same, they are essentially telling you what they value and want more of.

Point #5 can be a tricky one, but is still rooted in motivational theories offered by such behavioral scientists such as Frederick Herzberg and Abraham Maslow, who outlined the needs people bring to the choices they make in life. By reading between the lines of what people tell you they wish to retain, you may discover some things that are not as important to your volunteers as you believed.

The tricky part of this is that it comes by interpretation of what responders did NOT identify as needing to remain the same. To avoid jumping to any incorrect conclusions, it is best to categorize any such interpretation as a clue rather than a fact, and seek more information. You might, for example, do a follow-up survey of responders, pointing out that almost no one mentioned a need to keep volunteer uniforms.

In getting more information, you may find that indeed, the current volunteers do not feel particularly wedded to the volunteer uniform that has been around for 75 years. You may also,

however, find that no one mentioned uniforms because there was a carved-in-stone conviction that the uniform would NEVER change and was therefore above any discussion. As you examine omissions from responder's lists of what they want to stay the same, I urge you to never assume anything. Please do your homework and verify your conclusions.

All of the above efforts in information gathering are designed to help you approach change in the most effective, efficient and non-abrasive manner possible. In all the years I have written about or directly trained volunteer managers in the art of change, I have focused on helping people overcome resistance to change. If I were to train this topic tomorrow, however, I would add a section on helping people identify what their constituents want to stay the same, as I believe it would give a deeper understanding of how to proceed with changes.

As an added benefit, such an exercise may help people concentrate on what they enjoy the most in working with your program, offering them a reminder of why they do what they do. As a final benefit, I think it may give you, the program leader, a wealth of reasons to feel good about what you do while others around you are offered proof of the value of your program.

In having people identify what they want to stay the same, you are asking for insight on change from an entirely new and refreshing perspective. It can lead you to new understanding of perceptions, needs, expectations, values and motivations held by your working corps and in the people that surround and benefit from your program.

Here are some survey question examples you



may find useful in designing your own survey on what should stay "the same" in your program:

A survey for volunteers and paid staff who work directly in your program might include:

A. *An opening explanatory statement:*

"We are all surrounded by talk of change in our lives: technology, lifestyles, work patterns, relationships, etc. etc. Here in the Volunteer Program at ABC Hospital, we would like to shift the focus and instead of identifying what needs to be changed, look instead at what people feel needs to stay the SAME. Will you please help us by thinking about what the volunteer services department does at ABC Hospital and tell us the following."

B. *Questions, such as:*

1. What do you value the most in the volunteer program that you hope will essentially remain the same?
2. What do you expect will remain the same no matter what?
3. What do you believe should mainly remain the same but be changed slightly to improve it? Can you suggest specific slight changes?
4. What do you believe to be the most significant services or characteristics of the program that should never be changed?
5. What personally is the most assuring and comforting thing about the program that has remained the same all the time you have been here and that you value the most?
6. What opportunities for service do you value the most?
7. If you were recruiting someone to volunteer in our program, what would you tell him or her they could "count on" if they came to work as a volunteer at ABC?
8. What things that you thought would remain the same while you were working here have NOT stayed the same? How did you feel about them changing?
9. Can you identify in your imagination any changes that would cause you to leave the volunteer program? (In other words, they would not remain the same.)
10. What's the best part of being a volunteer here at ABC Hospital?

A survey of clients might include an opening statement much like the one used with volun-



teers and paid staff, and would be augmented by questions such as:

*If you had contact with volunteers during your time at ABC Hospital, could you tell us:*

1. What were the best things about your interaction with ABC Hospital's volunteers?
2. What do you hope will remain the same for others who come in contact with these volunteers?
3. What services do you hope the volunteer department of ABC Hospital will continue to offer?
4. Are there things about the hospital's volunteer services that you hope do NOT remain the same? What are they and why do you feel this way?
5. Are there any comments you would like us to convey to the volunteers?

A survey of external staff, such as nurses, admission clerks, floor supervisors or other department staff, would include an opening statement such as the one suggested previously, and possibly include questions such as:

*If you work directly with volunteers:*

1. What do you find most helpful in working with volunteers?
2. What do you hope remains the same about the volunteers with which you interact?
3. What do you expect will always remain the same among the volunteers you encounter?
4. What do you need from the volunteer department? What must you have from the volunteers to make their interaction with you successful?

*If you work indirectly with volunteers, encountering them occasionally in your work:*

1. What do you expect when you encounter a

- volunteer?
2. Which of your expectations do you believe will stay the same through the years?
  3. What do you hope the volunteer department will NOT change as they serve the hospital?
  4. What constants have you identified about the volunteer department and volunteers themselves that you hope will never have to change? (Their best attributes.)

A survey of the general public or potential support markets would include an opening statement appropriate for the audience and possibly include the following questions:

*If you have had contact with the volunteers and volunteer department at ABC Hospital please tell us the following:*

1. Was your experience positive? Negative? Can you explain?
2. What were the most positive aspects of your interaction?
3. If you had to interact with the hospital and its volunteers again, what would you hope would NOT change from the good experiences you had?
4. What efforts of the volunteers at ABC Hospital do you expect should never change?
5. If you might consider interacting with the volunteer department at ABC in the future, what might that contact be: as a client/patient; as a volunteer; as a supporter; as a donor?
6. When you do interact what do you hope or expect will have remained the same because it is so positive?

*If you have not had direct contact with the volunteer department or volunteers of ABC Hospital, would you please tell us:*

7. What would you expect if you would have contact with the volunteer services at ABC?
8. What do you believe they do now that should remain the same in the future?
9. Who do you believe the volunteer service department tries to recruit and what are they asked to do? Which of these characteristics and/or efforts should remain the same?
10. Of all that you have heard about the hospital and its volunteers, what is most pleasing to you?

You may need to add a form of disclaimer

statement on some of the surveys, particularly those addressed to volunteers and staff. This disclaimer might state the following:

"Please understand that although all of us may wish certain things to remain the same, this is not always possible. Some changes in the future may be mandated by higher authorities or circumstance that will challenge us all."

Finally, you may want some specific information about each responder in order to categorize and even weigh specific responses. If 15% of your responses indicate no interest in keeping the volunteer uniform and another 15% indicate they would fight to the death to retain them, it would be critical for you to know if the first group is younger and newer to the program than the second group.

To gather useful information on responders, I would suggest you consider at least some of the following questions:

1. Name (optional)
2. Status (mark all that apply)
  - Volunteer
  - Paid Staff
  - Donor
3. Years served as a volunteer or staff member:
4. Age category (optional):
  - teen
  - 20-35
  - 36-50
  - 51-60
  - 61-70
  - 71-85
  - 85+
5. Average hours served:
  - per week
  - per month
  - per year
6. Have you ever been a patient/client of ABC Hospital?
  - Yes
  - No

Identification questions for the general public



might include:

1. Have you ever had direct contact with ABC Hospital?

- Yes
- No

2. If "Yes" above, how? (mark all that apply)

- Patient
- Relative of Patient
- Volunteer
- Staff member
- Donor
- Other

3. Are you now considering any new type of contact with ABC Hospital?

- Yes
- No

4. If "Yes" above, what new contact?

- Patient
- Relative of Patient
- Volunteer
- Staff
- Donor
- Other

5. Would you like the Volunteer Services at ABC Hospital to contact you? If so, please give us your preferred method of contact:

- Phone
- evening:
  - day:

e-mail:

mailing address:

appointment at hospital? (Phone # so we may set this up)

other:

6. General information (all optional):

Name:

Address:

Phone:

Working? (mark one)

- Full time
- Part time
- Retired
- In School
- Homemaker

Some final tips:

Each program, agency or organization is different. Tailor survey questions so that they tell you what you need to know. Make wording as simple as possible. Keep the survey to one page if possible so that it doesn't overwhelm those who see it.

Tell people where to send or deliver it when it is completed. If it is to be mailed, include an addressed, stamped return envelope with it. If volunteers or staff are to return their surveys to the volunteer services office at your site, have a "RETURN SURVEYS" box in plain sight.

Share the results of surveys openly. Respond positively and in an adult manner to criticism; avoid defensiveness.

Change is inevitable, but how we plan for, predict, introduce and manage change is up to each of us. The more solid information we can gather regarding the needs, wants and opinions of the people who will be most effected by the change, the more equipped we will be to minimize resistance and enact change smoothly.



# Building Credibility and Clout for Yourself and Your Program

No, *clout* is not a bad word. It means having influence; being able to persuade; asserting a stance, and working to leverage the respect others have for you to better the position of the volunteer department in working toward the mission of the organization.

Thinly disguised, it is the art of marketing, deciding what and who you need, then strategizing to attain your need. The four questions of:

1. What do you HAVE?
2. What do you NEED?
3. WHO HAS what you need? and
4. HOW can you get what you need?

To begin to gain clout, I believe volunteer program executives (A phrase I use to attempt to raise the level of appreciation of all that you must do and be. You are executives, not simply managers, administrators or directors) must individually and collectively help erase any misconception that they are simply clerical workers and no more sophisticated than being the president of a small ladies-aide club!

Clues to misconceptions regarding your position might manifest themselves in several, subtle ways...

- If you are excluded from department head meetings, find a way to sit in to offer support or information. Then use the opportunity to show how valuable your presence is by offering connectedness with each department as they report on activities and needs. Offer assistance or questions that will prompt an "ah-Ha!" in other executive's thinking when they



are discussing new projects and you see an opportunity to interject volunteer energies to make it successful.

- If, during a money crunch, you see a disproportionate cut from your budget, gather facts on how the volunteers make the institution more cost effective, the value of volunteer time nationally, the impact volunteers have on public opinion and therefore potential supporters, and the statistics showing the giving patterns of volunteers versus non-volunteers. Then present your case logically, factually and with alternate suggestions of where cuts might be made that will not "gut" your department.

At Rex Hospital in Raleigh, NC, the volunteers themselves were asked for suggestions on ways in which the hospital might save money. They promptly offered several that ended up saving Rex \$50,000 per year! Needless to say, the Director of Finance is now a strong supporter of the volunteers in the hospital.

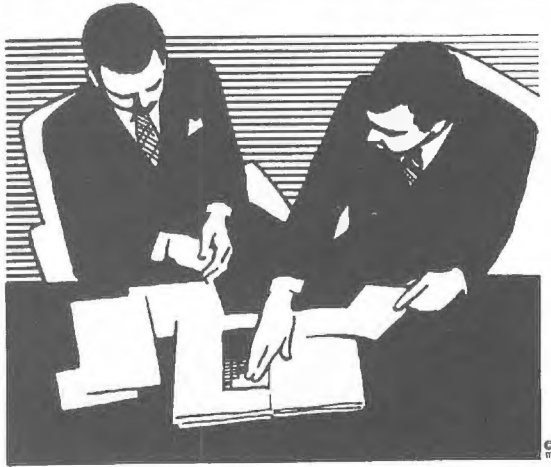
- If you find you are being paid more like a clerical worker than a department head, gather more facts to demonstrate the worth of the volunteers to the organization, the professional skills you have and need to direct all the energies of the human resources under your leadership, and your true role as internal consultant to others throughout the organization.

Such demonstrations of an attitude above you of "second-class citizenry" must be addressed, first by examining your own attitudes regarding your position and professionalism...if you are projecting a message of, "ah shucks, I'm just glad to be working with these great volunteers," it is time to take a hard look in the mirror and offer yourself a little lecture on how good and important what you do and who you are is to the whole organization!

## Building Personal Credibility

In their wonderful little book, *Building Credibility With The Powers That Be*, authors Gail Moore and Marilyn Mackenzie suggest that:

*"Personal credibility starts with YOU. Before others will value you and your services, you*



*must first believe in and value them yourself. What is your personal vision? What beliefs and values express your personal philosophy? Challenge yourself to think about the personal vision that drives you.”*

They then go on to help volunteer program executives examine their self-perceptions by asking them to fill in the blanks of the following:

1. *This is what I believe about myself as a person:*
2. *This is what I believe about volunteerism:*
3. *This is what I believe about volunteers:*
4. *This is what I believe about managing volunteers:*
5. *This is what I believe about working in a social service agency (school, arts, rehab, etc.):*
6. *This is what I believe about clients in this organization:*

After filling in the blanks on these 6 questions, the authors instruct readers to think through the same statement for each of the 6: *“Because I believe as I do, therefore this is how I behave...”*

That little exercise may help you to uncover your feelings and subsequently, how you project to others. Keep in mind the old admonition: *“What you do speaks so loudly, I cannot hear what you say.”*

On the road of professionalism, you must first root out your own attitudes, your relationship to yourself and others around you, before you can assess how best to build your credibility

with others.

We then need to look at ourselves as others see us, assessing how we present ourselves physically in dress, demeanor and appearance. As much as we would like for others to judge us only on our internal self, it simply does not happen that way. The volunteer program executive dressed appropriately in suit or classic outfit will command more credibility than one in sloppy jeans or (God forbid!) spandex shorts.

Only you can decide what is appropriate for your organization. The climate can vary from group to group, but whatever it is, dress as the executive you are! (And no spandex allowed, thank you.)

Knowledge is critical to the professional appearance of volunteer program executives! Being a font of information that many people in your organization can tap into, will do more to enhance your credibility than any other single thing. When you are perceived as a valuable and practical resource of knowledge, what you say in any setting will more readily be heard.

Other attributes of your professional standing that Moore and Mackenzie speak to include:

- showing respect for others.
- demonstrating honest and ethical behavior.
- recognizing that you have much to offer (without being a “know-it-all”).
- setting a good example in standards of quality of work.
- showing a warm and caring attitude with others.
- being sensitive to the needs of others.
- collaborating with others.
- being loyal to people so they know they can trust you.
- celebrating the success of others.

In a paper by the United Hospital Fund of New York, *The Changing Role of Volunteerism*, speakers at a conference of the same name listed additional suggestions for building professionalism and credibility:

1. Develop expertise in other fields beyond volunteerism.
2. Put on different hats to serve the broader organization when possible.
3. Communicate regularly with the board of trustees and staff in other departments.
4. Orient new employees about the volunteer program.

5. Work to build linkages with community agencies and groups.
6. Speak at conferences and meetings.
7. Document and publish new and innovative work to help other replicate it.

To these I would add: keeping up to date on information affecting your work and the mission of the organization; attending to the nurturing of the climate of your worksite; building and tapping networks that can support your work; reading, learning and translating information constantly; being open to criticism and testing it for its validity; keeping the "long-view"; continually searching for information from the field that you can pass on to the CEO and board; getting your organization's librarian to obtain major periodicals and works from our field.

The list could go on, but I'd rather stop here to let you add your own ideas.

## Ten Tips for Credibility

I have had the opportunity to meet thousands of volunteer program executives in an incredible variety of agencies. The best among them seem to share personal and professional qualities which others of us can view as benchmarks for credibility. These incredible people, easily found in our field...

- Have a vision...for themselves, their department and their organization.
- Are a passionate advocate for volunteerism.
- Build programs to better serve client needs.
- Set good examples. In every way.
- Know their stuff and work to keep on learning and growing.
- Become involved in planning, internally and externally.
- Build collaborative relationships on trust and reliability.
- Seek out and connect with supportive allies.
- Understand and leverage political & power networks.
- Value the contributions others and **THEY THEMSELVES** make!
- They are real and they care.

## Credibility of the Volunteer Department

After looking at personal credibility, it is critical to examine the credibility of the volunteer department. To have real clout, the department must:



- Contribute to the achievement of the agency or organizational mission.
- Effectively manage the volunteer resource.
- Offer real work that helps staff succeed.
- Mentor systems that empower success and goal attainment.
- Celebrate success and growth.
- Become valuable to all aspects of the organization through internal consultancy roles.

In boosting professionalism, credibility and clout, and constantly improving quality, we find a new ally in an often-overlooked resource: *the currency of Ideas*.

As our perspectives expand surrounding the definition of resources, we find several new items listed as valuable in addition to money and goods:

- ...Time
- ...Energy
- ...Information

To this list I would add what I see as a new currency of the 90's and beyond:

...IDEAS!

My conclusion comes from the endless list of writers...Covey, Drucker, Naisbitt, Popcorn, et al...who point to the information age in which we live.

They also parallel a new, very revolutionary theory in economics, proposed by Paul Romer, Ph.D., a professor of economics at the University of California at Berkeley.

His premise is that the economic growth of nations is in direct correlation to the IDEAS it comes up with and that future growth and development can be predicted by monitoring countries' ideas which he believes are the major

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engines of growth.

Just as Romer attributes knowledge and the ideas it generates as the factor for growth in nations, I believe the same factor will empower programs' growth.

Because organizations need all the help they can get to survive and thrive into the next century, this puts the volunteer service executive in a potentially powerful position. By using information to create ideas that integrate volunteers at all levels of work, the volunteer services department can fuel the growth and strengthen the entire organization.

Think about it.

- If volunteer executives can come up with new ideas to attract, integrate and empower volunteers to augment staff efforts, thereby increasing energy, synergy and effectiveness, the organization will be that much more effective in accomplishing its mission.

- If the volunteer services department can model the best characteristics of leadership, empowerment, community, accountability, mission-focus, wellness and systems-design, IT becomes the leader facet of the entire agency and establishes credibility at the highest executive levels.

The effective DVS of 2000 a.d. will carefully gather, nurture, invest, monitor and expend the currency of ideas so that the return on the investment strategies compounds to the most fruitful yields of increased effectiveness, credibility and expanded influence.

As master communicator and team builder, the DVS of the future will be ever-vigilant for new information and ideas, rewarding and coaching those who share them to come up with even more.

## Servant Leadership

When working to build credibility with those above, below or in parallel to you on someone's old-fashioned management chart, I can think of no better place to begin than with the work of Robert Greenleaf, who until his death in 1990, wrote and spoke about his concept of "Servant-Leadership". His phrase, less of an oxymoron than a sort of Zen koan, is really just a juxtaposition of apparent opposites intended to startle you and force you to have to think long and hard about the two words.

The concept is that the leader exists to serve those that he or she leads.

There are five principles to Greenleaf's work, which, when taken to heart, can offer a rather clear road map for increased credibility:

1. The leader takes people and their work very seriously, respecting and honoring them and working to empower their good works as authentic individuals.
2. The leader listens and responds to the expressions of the followers, asking questions and working to not always impose answers; the art of consensus-building is highly prized and used often by the leader. This attitude leads to continual quality improvement, marrying it with Demming's work on Total Quality Management.
3. The leader heals, working to make whole those wounds that occur; he or she is not afraid to openly share mistakes and pain, and does not run from "grief-work" in any setting.
4. The leader is self-effacing, never reading or believing press-clippings; glorifying leadership is NOT a goal!
5. The leader takes on the role and attitude of steward, pondering what has been entrusted to them; the leader brings vision but carefully listens to the vision of others, engaging those people directly affected by the choices to be made and coming up with a shared vision which is better than any one opinion.

Servant-leadership listens to what everyone has to say, draws out the best ideas, then adds a clear vision and soft management posture. All of this together defines the servant-leader who is a strong, selfless steward, determined to help others be the best they can be.

And if that doesn't sound a lot like the typical, highly effective volunteer services executives of this world, I don't know what does!

## Helping Your Organization Avoid Pitfalls

If you truly want to go to the head of the class of building credibility (and its dividend, CLOUT), help your organization sidestep the mistakes so many nonprofit groups make. In a wonderful little pamphlet by Brian O'Connell entitled *For Voluntary Organizations In Trouble or Who Don't Want To Be*, Brian offers his

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observations from many years of helping groups who find themselves in trouble.

His list of danger signals include:

- A failure to focus on mission and priorities, with people being side-tracked. This goes back to my exercise, which I find Brian uses also, of asking key leaders in an organization to write down their mission, then watching to see different answers arise. It clearly identifies a group in trouble...rather like beginning a trip wondering what all the confusion is when everyone has a different destination.

- A failure to invest in building the board is a particular horror story for Brian who has done so much to help organizations strengthen and guide the trustee-arm of groups. Too little time is given to searching for the right people, cultivating their interest and preparing for their work if and when they agree to join the board. A sub-category of this issue is confusion between the role of the board and that of the staff, which must be clear and workable, and explained carefully to any new staff or board members when they come aboard.

- Role confusion about the chief volunteer officer, and the trustee roles of board members versus other efforts as individual volunteers, can also point to problems in an organization. Watch for problems that are rooted in murky definitions of who does what and when. They can be deadly when people continue to trip over varying definitions of assignments and you hear phrases such as, "it must have slipped through the cracks" or "but I thought YOU were going to do that!" .

- Financial concerns can signal trouble for any size group. Deficits and lack of funds are almost a sure road sign for drained energies, stress, confusion and uncertainty. Whatever it takes to ethically get back on sound financial footing must be a priority. Often it takes someone outside of the treasurer's office or the development department to see that a lot of problems have their roots in over-taxed financial demands. In-fighting, bickering, suspicions, etc. can frequently be tracked back to too little operating funds and high competition between departments for money.

- Problems can come from right people being in wrong jobs. An executive director or leader who simply is not a match with your organization; board members who are single-issue



driven and refuse to become involved in the total organization; board or staff leaders who will not deal directly with conflict and permit a Pollyanna mentality that ignores small problems until they are a disaster; failure of executives to honestly evaluate progress and measure efforts against the mission for fear of offending anyone..(the "don't make waves" school of management).

- Lack of open information is another symptom of an organization in trouble so that full disclosure is restricted. Another variation on this same theme is failure to live up to legal and moral responsibilities in our age of demand for ethical operations.

The volunteer program executive cannot "fix" any of these problems that might arise...that is not part of her job description, but she can watch for signs of trouble and alert top leadership of possible areas for concern. If she can also suggest remedies for the problems and become a valuable member of any task-groups assigned remediation, her credibility will go up dramatically, and her professionalism respected by those in authority.

## **Influencing Your Program's Future**

To the strongest volunteer program managers, "clout" and "influence" are not four-letter words. Indeed, through our years of interaction with the best managers across North America, one common characteristic was their ability to use their power and influence to shape the organization around them.

Each of these powerful leaders customized their influencing efforts to the people, systems, resources and structures around them, but all of them seemed to adopt certain basic steps from which we can all learn.



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Strong leaders, wishing to shape the direction of their organization:

1. Were clear about what outcome they wished to effect. They were specific and not vague.
2. Were clear on the vision of the organization and made sure the effort they were proposing was true to this vision.
3. Were able to help others to see the vision and outcomes they proposed.
4. Thought through the necessary steps to achieving the outcome, including overcoming obstacles. Many could even quickly diagram the working process for others to see.
5. Thought through who the major stakeholders would be and enlisted their support as a work plan was developed. These same stakeholders were often called on to help secure necessary approval from authorities.
6. Understood resistance to change and worked to reduce such resistance by clearly outlining how people would fit in the changed environment, reassuring people that their position or authority would not be lessened or their work circles changed detrimentally.
7. Carefully laid out plans that clearly empowered people, involved them in decisions that affected them and rewarded those who assisted with persuading authorities of the need for the change or in the implementation of the change itself.
8. Encouraged creative thinking in mapping out new outcomes. They rewarded innovation and made it clear that as the new direction was implemented, there would be room for much flexible fine-tuning. Everyone understood that nothing would be cast in concrete in the first steps of the redirection.
9. Established that nothing would be considered a "failure" if something could be learned from any missteps.
10. Mapped out a plan to gain the authority needed to implement change and reviewed it as the persuasion effort progressed.
11. As change was implemented, each step was carefully reviewed to insure it was on track and that it would advance efforts toward the ultimate goal. They asked, "Is there a better

way we could be advancing? Are there significant others we need to involve in the process? Are we staying true to the overall mission of the organization?"

12. Understand that their task was not to talk people into a new direction for the organization, but to remove their reasons to say "no" to it.

To shape future efforts of an agency, program or organization, it requires a strong leader with a clear vision and indefatigable persistence. Such a leader must be creative, persuasive, focused, enabling, flexible and willing to share control.

They must have skills of coaching, planning, implementing, motivating, communicating, conflict resolution and change-agentry.

A thick skin and sense of humor are also most helpful!

## **Credibility & Clout**

Where once it was enough for the person leading the volunteer services department of an agency to simply manage those responsibilities assigned, today in our society of dynamic transformation, the volunteer program executive must expand her horizons to the broader organization.

In her new role as consultant to this wider community, it is critical to have the credibility and clout to impact decision-making, direction and effectiveness. The modern director of voluntary energies must develop those characteristics and skills needed to stand out among the hierarchy of an organization as a credible leader, professional in every aspect of work and a visionary whose direction is wisely heeded.

It is a blending of the art of clout and the science of credibility...and it is the wave of the future in our field.

# Words of Wisdom

In the course of working with thousands of outstanding volunteer programs over several decades, we have had the opportunity to rub elbows with many great leaders who are the reason for those program's success.

These leaders have shared words of wisdom we pass on to you, in no particular order:

1. Expect change. Nothing is forever.
2. In all you do, keep the client in mind.
3. Measure everything against the mission.
4. Wear comfortable shoes.
5. Take time to recharge your own batteries. If you don't, you'll stall out.
6. Watch everything you say. Never say anything you'd not want to appear in the newspaper the following day.
7. Persist but understand the value of timing. Your good idea may benefit most from being postponed to a more advantageous time.
8. Never believe your own press clippings. Don't think you're anything more than what you are. Arrogance topples more kings than wars.
9. Never use quarter words when nickel ones will do. Speak plainly.
10. Worship at the altar of word economy. Don't "over talk."
11. Avoid over-functioning. Doing work that should be the function of others wears you out, devalues those others and limits the number of stake-holders.
12. Never try to teach a pig to sing. It wastes your time and annoys the pig.
13. Never use dollar time on penny jobs. Choose where you spend your time. Prioritize work and focus on the most important.
14. Learn to say no.
15. Don't be afraid to say "I don't know." Find answers later and then share them with the questioners.
16. Learn from mistakes. Reframe and value them as learning opportunities.
17. Identify a totally trusted confidant, someone with whom you can share your thoughts as you work through issues. A colleague in a different department or personal friend may be wisest.
18. Never gossip. Never knowingly pass on bad information.
19. Work in the trenches on occasion. This helps you keep in touch with what your volunteers and paid staff face every day.
20. Tend to your own continuing education. New information and techniques surface daily; stay current.
21. Tap into networks of peers and others from whom you can learn and gain support.
22. Be involved with the professional organizations in our field. Join them if appropriate, subscribe to their periodicals and attend their conferences to keep your skills up to date.
23. Share credit. Put the spotlight on others as



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often as possible.

24. Don't be too eager to gain the spotlight. It simply makes you a better target!
25. When disappointments come along, examine them for what they can teach you then let them go and move on.
26. If it doesn't matter, don't let it matter. Don't allow yourself to be derailed over details that really are not that significant.
27. Never trip over anything behind you.
28. Adopt a positive attitude. It will sustain you.
29. Never assume anything, except, perhaps that miracles do happen!
30. Use humor carefully, but use it! It's a built-in R & R.
31. Beware challenging anything that touches someone else's perceived significance. People are the most defensive about projects that they feel defines their claim to fame.
32. We are called "human beings" not "human doings", thus we need to avoid confusing what we do with who we are. Keep the essence of your being healthy. Who you are is far more important in the long run than what you do.
33. Keep the various parts of you....work, family, faith, etc....in balance.
34. Listen to the hair on the back of your neck. Trust your instincts.
35. Respect others and their unique contributions.
36. Never tell anyone what your salary is.
37. Keep your eyes open. Expect new information to shape future actions.
38. Treat yourself. Take care of you so you can take care of others.
39. Laugh a lot.
40. Ask for help when you need it.
41. Don't keep score. It wears you



out and is a waste of time.

42. Understand that everything is cyclical. Your great idea of ten years ago hasn't become a bad idea today, it's just tired and ready for retirement. Wait another ten years and it may be "hot" again. Even bell bottoms came back! (Yuck.)
43. Identify the roles in your life: mentor, listener, cheerleader, playmate, challenger, etc. Tap them when needed.
44. Personalize your work space. Make it as comfortable as possible.
45. If you must work at home, set limits on your time and work only in one space. Close off that space when not working so it is not a continual part of your home life.
46. Accept people as they are. Accept commonalities and respect differences. Just about everyone is doing the best they can.
47. Look for learning waiting to be absorbed in every experience around you. There is no such thing as coincidence.
48. Transfer useful learning to action plans regardless of where they originated. Steal good ideas but give credit to their origination.
49. Mentally rehearse consequences of different choices. Identify any unacceptable outcomes and adjust choices or plan your responses to those that are acceptable.
50. Avoid accusative "negative-you" messages. Focus on outcomes, not people's personalities.

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51. Be clear about expectations.
  52. Develop your coaching skills.
  53. Ask good questions, then listen to responses. Restate them to insure that what you heard was what others intended to convey.
  54. In conflicts, identify where you disagree; build on these toward common or compatible grounds.
  55. Touch paper only once, especially mail. Sort items into action piles.
  56. Tuck small jobs in between bigger jobs so no time is wasted.
  57. Simplify and improve. Consider everything a work in progress.
  58. Mentor your successors.
  59. Plan for your own retirement. Leave before you are forced out or are a bumbling idiot.
  60. Eat more chocolate.





# Heritage Arts Publishing

Other books by Sue Vineyard and Steve McCurley include:

*Handling Problem Volunteers*  
*Measuring Up! Assessment Tools for Volunteer Programs*  
*101 Ideas for Volunteer Programs*  
*101 Ways to Raise Resources*  
*101 MORE Ideas for Volunteer Programs*

*Volunteer Management: Mobilizing All the Resources of the Community (McCurley & Rick Lynch)*  
*Recruiting Volunteers for Difficult and Long-Term Assignments (McCurley)*

*New Competencies for Volunteer Administrators (Vineyard)*  
*Beyond Banquets, Plaques & Pins: Creative Ways to Recognize Volunteers (Vineyard)*  
*Secrets of Motivation: How to GET and KEEP Volunteers (Vineyard)*  
*Secrets of Leadership (Vineyard & Lynch)*  
*Megatrends & Volunteerism: Mapping the Future of Volunteer Programs (Vineyard)*  
*The Great Trainers Guide: How to Train (almost) Anyone to do (almost) Anything! (Vineyard)*  
*How to Take Care of You, So You Can Take Care of Others (Vineyard)*

Sue Vineyard and Steve McCurley are also the editors of *Grapevine*, a bi-monthly newsletter on volunteer involvement. *Grapevine* is available for a \$25 annual subscription rate.

To order books or *Grapevine*, contact our distributors:  
(800) 272-8306 (N. Virginia) or (916) 928-3950 (California)

Books are also available on the Web at  
[www.energizeinc.com](http://www.energizeinc.com) or [www.amazon.com](http://www.amazon.com).

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**Sue Vineyard and Steve McCurley** have each worked in the field of volunteer management for 25+ years, first leading volunteers directly and then as two of the most respected trainers, consultants and authors helping colleagues lead a diverse variety of programs. Along the way they have collected and shared ideas and best practices that have helped countless others to greater and greater effectiveness in recruiting, managing and recognizing thousands of volunteers dedicated to making a difference in our world.

Throughout their partnership, which dates back to 1983, they have written extensively through their books (Sue has written 23, Steve 11) and as co-editors of the field's major periodical: **GRAPEVINE: Volunteerism's Newsletter** which is exclusively written for volunteer program managers & leaders. In that periodical they constantly share the best ideas from the best programs they encounter, and many of the sections in this book, written by either Sue or Steve, echo ideas first shared in part in **GRAPEVINE**.

With backgrounds in education and law respectively, Sue and Steve have brought a broad base of knowledge and experience to their work through the years, sharing practical, how-to information that others can use immediately. This book offers some of the ideas and knowledge they have encountered along the way, summarized in their own distinct styles. Hopefully, readers will find many gems that they, in turn, can use to enhance their own efforts of bringing miracles to life through volunteerism.