# CHANGING THE PARADIGM

Self-Assessment Kit
Team Leader's Resource Book

POINTS OF LIGHT
FOUNDATION

**With a Special Introductory Note
to the Executive Director**
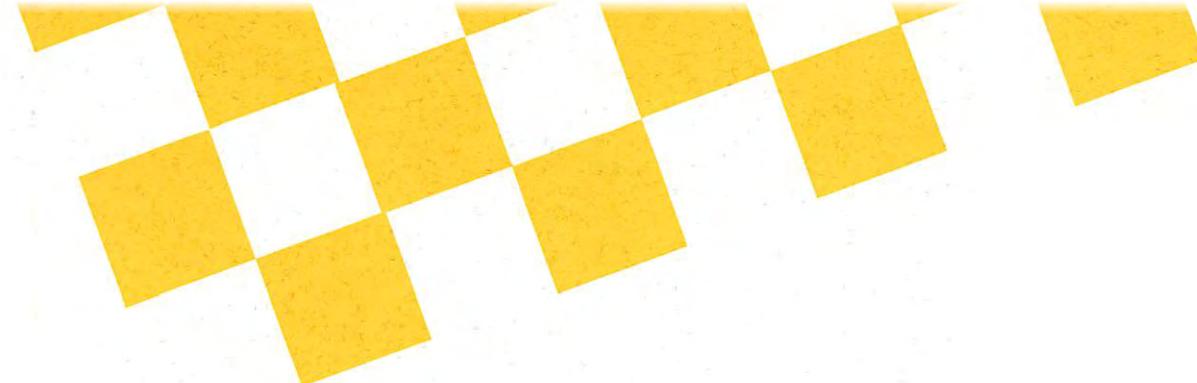
Changing the Paradigm
Self-Assessment Kit

TEAM LEADER'S RESOURCE BOOK
With a Special Introductory Note
to the Executive Director

by

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AT&T
Foundation

Acknowledgements

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Letter to the Executive Director

Welcome to the Changing the Paradigm Self-Assessment Process. This organizational change management tool guides staff, leadership, board and other volunteers to examine the effectiveness of their volunteer programs. Why is this self-assessment important to your organization?

Both nonprofit organizations and local government agencies are under increasing pressure to respond with greater impact to the complex human, social and environmental problems facing our communities. Their work is being done in an atmosphere of increased demand and static resources. There also is a growing expectation on the part of community leaders in business and government, and on the part of the public itself, that volunteers can and should play a role in addressing these problems.

Yet in many organizations, discussions of the work of volunteers falls outside the normal strategic planning or evaluation processes. Though highly valued, the work of volunteers is seen as separate and distinct from the balance of work done in the organization. As a result, there may be fewer opportunities to:

◆ **Learn about how volunteers and paid staff feel about the involvement of volunteers**

◆ **Identify ways to continuously improve volunteer involvement**

From an organizational standpoint there are three major reasons for conducting periodic assessments of volunteer programs.

1. **An assessment helps determine how to most efficiently utilize agency resources. Directors of agencies are faced with the need to make critical decisions about scarce resources, determining where the agency should devote its time, energy and funds. The self-assessment survey will identify whether the agency is not getting the most out of volunteer resources, perhaps due to undesirable management practices or through lost opportunities. Some of these weaknesses are of the type that cannot be identified without a systemic examination such as that provided through the self-assessment process.**

2. **It will create a more effective volunteer involvement system. The self-assessment process will help to identify where there are specific problems in mission understanding, systems management,** roles and relationships, communications and other areas. When volunteers are not involved effectively it both wastes the energy of the staff and may also lead disgruntled volunteers to criticize the agency within the community.

3. **The assessment will develop a consensus for needed change. Self-assessment is a process that involves key elements within the agency in examining and evaluating what is happening in volunteer involvement. The process of conducting the assessment creates the evidence for where changes are needed and builds an interest in, and consensus for, making the needed changes. The mere process of discussion about the Paradigm characteristics will begin to change attitudes about volunteer involvement.**

In 1992, The Points of Light Foundation undertook groundbreaking research to better understand the ways people are involved as volunteers in human service organizations (health, education, social welfare and grassroots problem-solving). From that research grew the identification of 11 characteristics that differentiate organizations that are highly effective in involving volunteers from those which are less effective.

Those characteristics were later grouped into the four action principles around which this material has been built:

◆ **Lay the foundation through mission and vision**

◆ **Combine inspiring leadership with effective management**

◆ **Build understanding and collaboration**

◆ **Learn, grow and change**

The most important observations we made about those organizations that were more effective in the involvement of volunteers are this:

In them, the work of volunteers more directly contributes to the mission and priorities of the organization.

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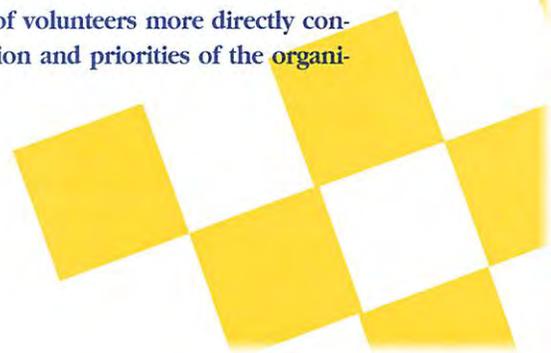
Also, in them, there is a greater "alignment" of mission, current priorities and the work being done by volunteers. The action principles and the characteristics underlying them explain why that is true. The purpose of the self-assessment process is to help organizations understand how they can move toward that same degree of alignment.

We have shared these research findings with literally hundreds of local and national nonprofit organizations, agencies of local, state and federal government, and both private and public funders. We have found that the work we did and the conclusions we drew have a high degree of "face validity" that is, they make sense to people.

But sharing the research also elicits one persistent question: "How can we find out how our organization measures up against the characteristics of high effectiveness identified in the research?"

The process described in this booklet answers that question. It is based on the assumption that, with guidance, people can reflect on and learn about the way their organization works. We believe that it is possible to collect and analyze data, discuss it and turn the fruits of that work into knowledge that can help the organization do a better job.

The process is built around three broad components:

1. **A Leadership Team that is representative of the board of directors, management, line staff and volunteers of your organization. The purpose of this team is to lead the way through the process. It reports to you. One individual should be designated to serve as Team Leader. The material in this booklet is designed to help the Team Leader do his or her job effectively.**

2. **The survey instrument that will be given to a sample of all paid staff and volunteers. In some organizations, it may be possible to survey everyone; in very large organizations, perhaps only a representative sample will be selected.**

3. **Analysis and discussion of the results of the survey by the team and then throughout the organization. The data becomes an opportunity to identify and work on barriers to effective volunteer involvement. This is the first step toward developing an**

> Every action you take has a ripple effect throughout the organization.

action agenda of steps to increase the effectiveness of volunteer involvement in your organization.

Our research clearly reinforced something that all of us know but too often forget. Organizations are systems. All parts are related to all other parts. There are rarely simple, direct solutions to problems. Every action you take has a ripple effect throughout the organization.

As a result, when you seek to learn about the involvement of volunteers, you also will be learning about how the organization works for everyone in it, including your customers. Assessing one aspect of the organization will give you insight into many aspects. If you are prepared for and open to this, self-assessment can be a tremendously valuable learning process.

That is why your role as leader of the organization is critical. Only you can bless this self-assessment process with the credibility it needs. Here is what we hope you do:

1. **Review this booklet thoroughly so that you understand the process and its anticipated outcome.**

2. **Make the commitment to support this work.**

3. **Inform the board of directors of this work and ask for their participation and support.**

4. **Select a strong team leader who has the skills to manage and facilitate the process.**

5. **Appoint a broadly representative Leadership Team, working in consultation with the Team Leader, to lead the organization through the process.**

6. **Meet with the team first when it begins its work, to reinforce your support, and, second, when it completes the analysis of the survey results.**

7. **Insure sharing of the results through the organization and create an expectation that dialogue and planning will take place based on the results.**

Should you, as executive director, serve as the Team Leader? Perhaps, but, only as long as you are comfortable committing the required time and playing a facilitative role. In most cases, however, the executive director will delegate this responsibility to another senior manager, such as the director of volunteers, or to a highly respected volunteer leader.

One of the primary roles of leaders is to shape the culture of their organizations. A process such as the one outlined here can be a powerful tool to reinforce the value of reflection, learning and continuous improvement in the organization.

A Letter to the Team Leader

Congratulations! You have been invited to lead a self-assessment process designed to help your organization increase the effectiveness of its involvement of volunteers.

Your role is to serve as the manager and facilitator of the process, working in partnership with a Leadership Team that is representative of the board of directors, top and middle management, paid staff, leadership volunteers and direct service volunteers. With them, you will plan how best to implement this process in your organization, will collect and analyze data about the perceptions of paid staff and volunteers concerning the involvement of volunteers, and will begin work on a plan to increase the effectiveness of that involvement.

The process consists of **eight** steps. Each is described in this booklet. We urge you to read this booklet through in its entirety first to gain an understanding of the total process. You also will want to review thoroughly all of the other material that has been provided as part of the *Changing the Paradigm Self-Assessment Kit.* Be sure to read the first section of this booklet ("Letter to the Executive Director") so you will understand the expectations of the executive director in this process.

Organizations that will not only survive but thrive in the years ahead will be those that have learned how to learn and are committed to continuous improvement. Self-assessment is a key element of learning and continuous improvement.

At its simplest, self-assessment asks the question, "How are we doing?" At its best, it asks that question in ways that provide useful data and a framework within which that data can be converted to knowledge, that is, into action that helps the organization perform better.

> Self-assessment is a key element of learning and continuous improvement.

This particular self-assessment process is focused on one component of your organization, the involvement of volunteers. But because organizations are systems composed of interdependent parts, you will be learning about how the organization works for everyone in it, including your customers. Assessing one aspect of the organization will give you insight into many.

As Team Leader, a major part of your role is to share the results of this process with the entire organization, from the board of directors to management to the line staff to the direct service volunteers. As you do, you will contribute to steady improvement in the overall work of the organization.

This is an important role. We urge you to take it seriously and to commit the time needed to prepare for and implement the process.

Your first step is to read everything in this booklet and in the *Changing the Paradigm Self-Assessment Kit.* After you've done that and have formulated the approach you want to take to this project, sit down and talk it through with the executive director. The strength of your partnership will be important to the overall success.

STEP #1 BUILD YOUR PERSONAL UNDERSTANDING

You will manage and facilitate the process through which your organization assesses the effectiveness of its volunteer involvement. To understand the research and tools at the heart of this process we recommend that you:

1. **Read this entire booklet.**

2. **Watch the Changing the Paradigm videotape.**

3. **Read both reports on the Paradigm research, which are included.**

4. **Review thoroughly the booklet for members of your team.**

5. **Reread this booklet, making notes on how best to adapt its contents to your own organization.**

6. **If you are uncomfortable with the computerized tabulation of the surveys, seek assistance from someone who can translate it for you.**

Perhaps the best way to test your understanding of the process is to formulate your own plan for how to implement it and then share that plan with the executive director and others in the organization. Their feedback will give you a good indication of your own mastery of the material.

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STEP #2 CREATE A LEADERSHIP TEAM

The Leadership Team leads the organization through the self-assessment process by:

♦ **Planning the overall effort**

♦ **Building support for the process throughout the organization**

♦ **Analyzing the results of the survey**

♦ **Stimulating dialogue throughout the organization about how best to use those results**

Members may also help administer and compile the survey.

The size of the team depends on the size of the organization. Except in extraordinary cases, it probably should have no more than eight to ten people. Very large organizations may want to assess only a portion of their operation at any one time or have several teams operating simultaneously but in close cooperation, each assessing a different piece of the organization.

The Leadership Team should include at least one representative of:

♦ **Board of directors**

♦ **Senior managers**

♦ **Middle managers**

♦ **Line staff (both professional and support)**

♦ **Volunteers (other than members of the board) making sure to include all major categories of volunteers (fundraising, administrative, direct service)**

To the extent possible, the team also should be representative of the major program areas of the organization.

The team should be appointed by the executive director in consultation with you, the Team Leader. Your role is to identify potential team members and work through the selection with the executive director.

The team should report directly to the executive director of the organization. In addition, the board of directors should be fully informed about the work of the team and should expect to receive the results of the self-assessment.

Team members should be asked to commit to a minimum of three working meetings of two to three hours each, plus preparation time.

The purpose of the **first meeting** is to come to a common understanding of the task, the work of the committee and the self-assessment process. It is a time for planning to whom and how the survey will be administered. It also is a time to learn about the basic ideas around which the self-assessment process has been built.

At the **second meeting**, the results of the survey are analyzed. The team looks at how other people view the involvement of volunteers and begins to draw conclusions. How and with whom to share the results of the survey is decided.

The **third meeting** results in action steps that will improve the involvement of volunteers.

At that point, the team becomes oriented to taking action based on its learning and will wish to renegotiate its continuing role, if any, with the executive director.

Each team member should receive a *Team Members' Workbook*, included in this kit, that provides background on the self-assessment process and on the research which underlies it. Team members should be expected to familiarize themselves with the workbook prior to the first meeting.

STEP #3 PLAN TOGETHER

Each team member should receive and review the *Team Members' Workbook* prior to the first meeting of the team. At that first meeting, the agenda should include:

♦ **Introductions of team members**

♦ **Overview of the work the team is to do**

♦ **Review of the research underlying the self-assessment process, including the four action principles around which the self-assessment tool is built**

♦ **Development of a plan for completion of the self-assessment process**

Introductions. The team will be meeting together at least three times, so it is important that team members become familiar with one another. This is particularly important in large or fragmented organizations or in situations where board members and direct service volunteers may not be familiar with the entire organization. You may want to ask members to introduce themselves or break into pairs and ask them to interview and introduce one another.

The Overview. You may wish to use Overheads #1 and #2 for this purpose. The corresponding section in the *Team Members' Workbook* is the "Introduction." The key points to stress here are:

♦ **The commitment and expectations of the top leadership of the organization, including the board of directors, if appropriate**

♦ **The specific roles you wish the team members to play, collectively and individually**

♦ **The time frame within which you expect to complete the work**

♦ **The major activities to be undertaken**

You may wish to have the executive director attend at least the early part of the meeting and reiterate his or her interest in the project. Similarly, the board representative to the team should be briefed in advance and prepared to reflect the board's interest.

The Research. You may wish to use Overheads #3-8 for this segment of the meeting. The corresponding section in the *Team Members' Workbook* is "About the Changing the Paradigm Project." This is also an excellent point to show the Changing the Paradigm videotape to the team.

The purpose of this is simply to acquaint the team with the fact that the self-assessment tools grew from research that was conducted with nonprofit organizations and public agencies. Key points to cover include:

♦ **The nature and scope of the research**

♦ **The four "action principles"**

♦ **The 11 characteristics of effectiveness**

Each characteristic and principle does not need to be discussed in-depth at this point. This will be most useful during the analysis of collected data. For now, team members need to understand the origin of the Paradigm concepts and the general areas of organizational life that they cover.

The Plan. This should be the most significant outcome of the meeting. It should include provision for the following activities:

♦ **Explaining the self-assessment process to the rest of the organization**

♦ **Deciding which people to ask to complete the survey and determining how to get the maximum response from them**

♦ **Making sure that you, as team leader, have the help you need in tabulating the surveys**

♦ **Meeting again as a full team to discuss the results and plan what comes next**

> Acquaint the team with the fact that the self-assessment tools grew from research

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An essential part of the plan is a realistic **timetable** for completion of the work. Because this is a rather straightforward process, the timetable should be relatively short so as to sustain interest within the organization.

The section in the *Team Members' Workbook* corresponding to this task is "Creating a Plan." It suggests these questions be used to develop the plan:

1. **What is the best way to let staff and volunteers know about the self-assessment process? How can information about the process be shared without creating anxiety about whether individuals are being evaluated?**

2. **What is the best way to get a cross-section of people to complete the survey: board members, paid staff at all levels and in all program areas, direct service volunteers and support volunteers in all program areas? What is the best way to distribute and collect surveys? Based on the size of the organization, how many people should be surveyed? (More information on creating a survey sample will be found in Step #5 Collect the Data.)**

3. **What roles should members of the team play in the following?**

   ◆ **Telling the organization about the process**

   ◆ **Selecting the people to complete the survey**

   ◆ **Distributing and collecting the survey**

   ◆ **Tabulating the survey**

4. **When should each of these tasks be completed?**

As Team Leader, you may wish to have fairly firm answers to these questions in mind prior to the meeting, perhaps even having a draft plan ready for the group to review. But, remember, that the greater the participation of team members in developing the plan, the greater will be their ownership of the work to be done.

Paradigm Characteristics of High Effectiveness

1. The mission and priorities of the organization are framed in terms of the problem or issue the organization is addressing, not its short-range institutional concerns.

2. There is a positive vision—clearly articulated, widely shared and openly discussed throughout the organization—of the role of volunteers.

3. Volunteers are seen as valuable human resources that can directly contribute to achievement of the organization's mission, not primarily as a means to obtaining financial or other material resources.

4. Leaders at all levels—policy-making, executive and middle management—work in concert to encourage and facilitate high impact volunteer involvement.

5. There is a clear focal point of leadership for volunteering but the volunteer management function is well-integrated at all levels and in all parts of the organization.

6. Potential barriers to volunteer involvement—liability, confidentiality, location of the organization, hours of operation, etc.—are identified and dealt with forthrightly.

7. Paid staff are respected and are empowered to fully participate in planning, decision making and management related to volunteer involvement.

8. There is a conscious, active effort to reduce boundaries and increase teamwork between paid and volunteer staff.

9. Success breeds success as stories of the contributions of volunteers—both historically and currently—are shared among both paid and volunteer staff.

10. There is an openness to the possibility for change, an eagerness to improve performance and conscious, organized efforts to learn from and about volunteers' experience in the organization.

11. There is a recognition of the value of involving, as volunteers, people from all segments of the community, including those the organization seeks to serve.

STEP #4 BUILD INTERNAL SUPPORT

The fact that you have come this far suggests that there is support for the self-assessment process on the part of the executive director and the board of directors. But it is equally important that everyone else in the organization understand the process and the anticipated outcomes.

People especially need to understand that they as individuals are not being evaluated. Rather, the process is designed to collect information about how paid staff and volunteers perceive the behavior of the organization in relation to the involvement of volunteers. The value of the process is not in passing judgement on that behavior but discussing within the organization the results of the data that is collected.

> When people get together to talk about improving their work, good things usually happen.

When people get together to talk about improving their work, good things usually happen. The data collection and analysis are ways to begin that discussion.

Three groups of people need to be informed about the self-assessment process: managers, other paid staff and volunteers. You and your team will know best how the most effective communications with those groups happens. You may want to make these key points:

◆ **The purpose of the self-assessment is to help the organization more effectively involve volunteers in its work.**

◆ **People from throughout the organization will be asked to participate as a way of getting the most complete picture of how the organization currently operates with respect to its volunteers.**

◆ **Only a few minutes of time will be needed to read and complete the survey.**

◆ **All responses will be anonymous and confidential. Only tabulated data will be reported.**

◆ **Everyone in the organization will learn of the results and have the opportunity to react or participate in further discussion.**

A fact sheet stating these points can be distributed, but it is just as important that you talk with people about the process so that they understand and support it. General staff meetings or departmental meetings are excellent vehicles for doing this. Remember that each of the three target groups — managers, other staff and volunteers — will have different questions and concerns; they may also have different forms of resistance and different levels of interest.

Building an understanding of the self-assessment process now creates a willingness to consider the results later.

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STEP #5 COLLECT THE DATA

At the heart of the self-assessment process is the survey of paid staff and volunteers. Again, its purpose is to determine perceptions about how the organization behaves with regard to the involvement of volunteers.

The survey instrument consists of 24 statements. For each one, respondents are asked to indicate how often the statement is true for their organization: rarely, sometimes, usually, frequently or always. The statements are straightforward and can be answered based on the experience each person has had with the organization. There also is a separate score sheet on which respondents can tabulate their responses. In the directions that accompany the survey, respondents are asked to answer every question to the best of their ability.

It is important to have members of all the major stakeholder groups complete the survey. These include the same groups represented on the Leadership Team:

♦ **Board of directors**

♦ **Senior managers**

♦ **Middle managers**

♦ **Line staff (both professional and support)**

♦ **Volunteers (other than members of the board) making sure to include all major categories of volunteers (fundraising, administrative and direct service).**

The number of people asked to complete the survey depends on the size of the organization. In smaller organizations, it may be possible to ask everyone to complete the survey. In larger organizations, it may be necessary to identify a sample of each group.

To construct a sample, here are some guidelines:

1. **All major stakeholder groups should be represented, although not necessarily in the same proportion. If you have 20 staff and 250 volunteers, you may want to survey all of the staff but only 10-15 percent of the volunteers.**

2. **A variety of people should be represented — those of varying ages, lengths of service in the organization, at different levels within the organization, etc. The goal is to create a picture of the organization that takes account of numerous perspectives.**

3. **Don't look only for good news. Survey people who are critics of the organization or who are resistant to engaging volunteers, as well as those who are fully supportive. You may even wish to consider surveying former volunteers or staff, if it is convenient to do so.**

Try to create a "Do it now!" attitude that doesn't allow the survey to languish in in-boxes.

The survey is designed to be completely confidential (except that people are asked to indicate into which of three basic groups they fit: board of directors, paid staff or other volunteers). It can be administered either in group settings (such as at a staff meeting) or individually (perhaps with a cover letter from the executive director). It should take no more than 10 to 15 minutes to complete so that people can be asked to respond promptly. The shorter the deadline, the more likely it is that people will respond. Try to create a "Do it now!" attitude that doesn't allow the survey to languish in in-boxes.

The Leadership Team should decide to whom the survey will be given, how it will be administered, how it can best be presented to staff and volunteers to have maximum credibility and how to follow up to insure a maximum return.

The survey instruments are packaged in bundles of 25. If additional survey instruments are needed, they can be ordered using the order form included in the Kit.

The survey consists of one sheet. The front page is the survey itself. The back side is the individual tabulation form. Each person should be asked to tabulate the survey and return the survey to a designated person or location by a specific date.

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STEP #6 TABULATE THE RESULTS

Now it is time to tabulate the surveys that have been returned. While, as Team Leader, you need to be directly engaged in this work, you may want to ask members of the Leadership Team or others to assist you.

To allow for the most complete compilation of results, special software has been included in this kit. Anyone with a basic knowledge of computers can use it — if not you or a member of the Leadership Team, then perhaps a volunteer.

Although the software has a separate instruction sheet, please note that it:

◆ **Allows for entry of all surveys and for their division into groups: board of directors, paid staff and other volunteers**

◆ **Provides average scores for each statement and each action principle, for each group and for all respondents**

◆ **Comes in both PC and Macintosh versions**

The program, developed by Lynch Associates specifically for The Points of Light Foundation, is extremely user-friendly and will produce reports that can be copied and shared with members of the Leadership Team.

STEP #7 ANALYZE AND DISCUSS THE RESULTS

After the data is tabulated, the Leadership Team should meet to analyze and discuss the results of the survey. This may take more than one meeting. Be sure to allow adequate time for full exploration of the results.

In advance of the first meeting, each member should receive and review copies of the software summary score sheet. Discussion will be built around these. The section of the *Team Members' Workbook* which corresponds to this task is "Analyzing the Data".

Begin the meeting by reviewing the four action principles, using Overheads #4-8 and drawing on the explanation of the principles and characteristics in the two Changing the Paradigm Research Reports. If you have not previously shown the Changing the Paradigm videotape, now would be a great time to do so.

Because these principles are the foundation for the entire self-assessment process, all members of the team need to have a basic understanding of them at this point. You may want to have circulated parts or all of the research reports to the team in advance of this meeting. Some organizations have found it helpful to break the team into four subgroups, assigning one subgroup to each principle and asking them to teach it to the rest of the team.

The surveys will result in a single composite score for each action principle, plus scores for each of the three stakeholder groups. Depending on the approach used for tabulation, you also may have scores for each of the 24 statements on the survey.

> *These principles are the foundation for the entire self-assessment process, all members of the team need to have a basic understanding of them.*

- **The single composite score tells you how the total group of respondents feels about the organization's performance on that principle.**

- **The group scores allow you to see how the board of directors, the staff and the other volunteers feel about the organization's performance on that principle.**

- **The scores for each statement allow you to see specific behaviors that may need to be altered or reinforced.**

All three scores are important.

- **Low overall scores reflect a consensus about areas in which the organization may wish to concentrate in improving the way it works.**

- **Wide gaps in group scores reflect points on which there are very different perceptions, thus indicating very different experiences among the stakeholder groups. There may be points of contention among these groups and in need of attention.**

- **Scores on the specific statements may vary widely within a given action principle. Again, look for very low scores or places where there is a great difference among the groups.**

Allow the team to react to the scores themselves, but remind them that the scores only reflect the current perceptions of paid staff and volunteers. There is no absolute right or wrong. While all of us would like to have consistently high scores on everything, this is not realistic in the rapidly changing environment in which organizations work. What is most important is to discuss the implications of these scores for future decision-making.

To guide that latter discussion, each *Team Members' Workbook* contains four worksheets, one for each action principle. These are reproduced in this booklet on the following eight pages. The team should use these worksheets as the basic guide to their discussion of the survey results. Your job as Team Leader is to facilitate these discussions:

- **Insuring that everyone has an opportunity to contribute**

- **Moving the group toward a positive, action-oriented conclusion and away from blaming or rationalizing**

- **Summarizing and encouraging the development of agreement on next steps**

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Note that each worksheet begins with a question about how team members feel about the results. While not especially scientific, it is important to identify and discuss these feelings. It may be that something in the results truly doesn't feel right, doesn't fit with the perceptions of any of the members of the team. Talk about that and try to understand, by looking closely at the scores, why others might have different perceptions.

It can also happen that members of the team and, ultimately, the organization as a whole, decides that the investment required to improve a particular behavior is not worth the anticipated pay-off. Not everything is of equal importance and not everything can be a top priority. Part of what the team will do in its discussion is identify the top priorities and the places where a significant return can be achieved for the most reasonable investment.

Each worksheet ends with a brainstorming exercise about actions that might be taken to increase the effectiveness of the organization on that particular principle. As you set up the brainstorming, you may want to remind team members of these rules of the road for effective brainstorming:

♦ **The purpose of brainstorming is to get out the maximum number of ideas in a short period of time. Thus, repetition is desirable since it might put a different shading on an idea or suggest something new to someone else.**

♦ **The recorder should write down all ideas.**

♦ **Ideas shouldn't be discussed. There will be time for analysis and prioritizing after the brainstorming is over.**

♦ **Avoid making judgements. There are no dumb ideas during brainstorming.**

The results of the brainstorming can be used by the team to create an action agenda that can be shared with the rest of the organization.

The worksheets allow for note-taking and individual responses. Encourage team members to use them in this way.

Examples of Interpreting Scores:

Low Overall Scores

Consider the following set of total scores for the four action principles:

	Staff	Volunteers	Leadership
Lay the Foundation	24.9	24.3	24.9
Leadership and Management	20.6	21.7	22.3
Building Understanding	23.5	23.7	23.7
Learn, Grow and Change	23.6	23.5	24.1

In this case the scores for the second action principle, "Combine Inspiring Leadership with Effective Management" are much lower for all three groups of respondents than are the scores for the other action principles. This could indicate a consensus that the structure of the volunteer management system is not perceived as being effective or well-operated.

Wide Gaps in Scores

Suppose that the responses for question #1 are as follows:

	Staff	Volunteers	Leadership
1. Everyone involved with the organization has a clear idea of the role volunteers should play in the organization.	3.1	4.2	3.8

Note the extreme gap between the response of staff and of the other two groups. If most staff do not currently work with volunteers, this score might indicate that information about the volunteer program and its accomplishments are not being well communicated to paid staff. If most staff are working with volunteers, this low score might indicate dissatisfaction felt by staff about their relationship with volunteers (which you could double-check by looking at questions #14 and #16) and could indicate the need for better role clarification or trouble-shooting.

Varying scores on specific statements

You might notice patterns or differences in specific questions. What if the general range of responses for questions #19, 21, 22, 23 and 24 ("Learn, Grow, and Change") were from 3.7 to 4.5 and the responses for question #20 were:

	Staff	Volunteers	Leadership
20. Volunteers are regularly asked to evaluate their involvement in the organization, including the way they are managed.	2.9	3.0	3.5

In this case you would note both the variance in the responses to this question versus the other questions in this action principle and also the difference between the scores for leadership volunteers versus the other two groups.

Action Principle #1

LAY THE FOUNDATION THROUGH MISSION AND VISION

1. How do you feel about the scores from each group and the composite score? Do they fit with the experience and perceptions of the members of the team? Do the scores seem low, high or about right to you?

2. Write down what you think is the mission of the organization. What are the major points of difference among team members? How often is the organization's mission discussed with staff? with volunteers? by the board of directors?

3. What are the three or four most important priorities of the organization? How does work now being done by volunteers relate to these priorities? Is there a close match, or does the work of volunteers seem irrelevant to those priorities?

4. How much of the work of volunteers fits into each of these categories:

   ◆ Work other than fundraising that directly supports the mission and priorities

   _____%

   ◆ Fundraising _____%

   ◆ Work that may be useful but does not directly support the mission and priorities

   _____%

   [Note: In the most effective organizations, volunteers may play an important role in fundraising but also are working in a variety of ways to directly support mission and priorities.]

5. Look at the scores for each of the survey statements within this action principle (Statements 1-6). Which are the lowest? Why might they be so low? What can be done to raise them?

6. Brainstorm ways in which the work of volunteers could more directly support the mission and priorities.

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Action Principle #2

COMBINE INSPIRING LEADERSHIP WITH EFFECTIVE MANAGEMENT

1. How do you feel about the scores from each group and the composite score? Do they fit with the experience and perceptions of the members of the team? Do the scores seem low, high or about right to you?

2. What roles do each of these groups play in promoting and supporting volunteer involvement? Who among these groups energizes volunteers in the organization?

   ◆ Board of directors:

   ◆ Executive director and other senior managers:

   ◆ Middle managers:

3. To what extent are the primary volunteer management functions — recruitment, placement, training, supervision, evaluation and recognition — the responsibility of the paid staff with whom volunteers work most directly?

4. What are the primary barriers to more effective volunteer involvement in the organization?

5. Look at the scores for each of the survey statements within this action principle (Statements 7-12). Which are the lowest? Why might they be so low? What can be done to raise these?

6. Brainstorm ways in which these barriers can be reduced.

Action Principle #3

BUILD UNDERSTANDING AND COLLABORATION

1. How do you feel about the scores from each group and the composite score? Do they fit with the experience and perceptions of the members of the team? Do the scores seem low, high or about right to you?

2. Who makes the decisions about how, when and where volunteers are involved? Are these decisions made as close to the action as possible?

3. In what ways are the concerns of paid staff about volunteers addressed? Do they have the opportunity to discuss how volunteers affect their own roles and how they do their jobs? How could such opportunities be expanded or enhanced?

4. What are the best stories you can think of about the contributions volunteers make to the organization? Are these stories widely known by paid staff and volunteers? How can these stories best be spread?

5. Look at the scores for each of the survey statements within this action principle (Statements 13-18). Which are the lowest? Why might they be so low? What can be done to raise them?

6. Brainstorm ways in which teamwork between paid staff and volunteers can be made stronger.

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Action Principle #4

LEARN, GROW AND CHANGE

1. How do you feel about the scores from each group and the composite score? Do they fit with the experience and perceptions of the members of the team? Do the scores seem low, high or about right to you?

2. Does the organization consider its volunteers to be customers of the organization? If so, how does it go about learning the interests and needs of these customers? How does it seek to satisfy those needs?

3. How does the organization learn from the experiences of its volunteers? Are regular volunteers debriefed often? Do volunteers who conclude their service participate in an exit interview? How is data gathered from such activities shared in the organization? How could this learning be increased?

4. To what extent do the volunteers reflect the ethnic, racial, economic, age and gender make-up of the community you are serving? Are people the organization seeks to serve also involved as volunteers?

5. Look at the scores for each of the survey statements within this action principle (Statements 19-24). Which are the lowest? Why might they be so low? What can be done to raise them?

6. Brainstorm ways in which volunteers from the entire community can be attracted to service in the organization.

STEP #8 DETERMINE NEXT STEPS

Collecting, analyzing and discussing data from a survey is only the first part of a self-assessment process. The important part of the process is what happens after the discussion—the ways in which the organization responds to the data, the commitment made to improving performance and the specific action that is taken.

The role of the Leadership Team now is twofold:

◆ **To share the results of the survey throughout the organization**

◆ **To recommend a course of action that might be taken in response to the survey**

Sharing the Results. It is essential that the results of the survey be shared with everyone in the organization. Doing this incrementally will allow the organization to respond promptly. Here is how one organization did it:

1. **The Leadership Team met with the executive director, reviewing results, analysis and recommendations.**

2. **The executive director, the Team Leader and a member of the team presented results to senior managers, engaging them in a discussion and gaining their support for the next steps.**

3. **The executive director and the Leadership Team made a presentation to the board of directors, led by the board's representative to the Team. The result was an enthusiastic sign-off by the board on the proposed next steps and a commitment to explore how the results could contribute to improving the board's own effectiveness.**

4. **In collaboration with senior managers, presentations were made by team members at department meetings. These presentations involved both paid staff and volunteers. Each department used the presentations as the first step in planning how it could contribute to increasing the effective engagement of volunteers.**

5. **Information about the results, the various discussions and the proposed next steps was included in the organization's newsletter, which goes to all paid staff and volunteers as well as members of the community.**

The Leadership Team should develop a specific plan for how best, in your organization, to share the results and engage others in the discussion.

Recommending Next Steps. Because it has been immersed in the results, the Leadership Team will have some important insights about potential actions that could be taken to increase the effective engagement of volunteers in the organization. These need to be formulated into specific recommendations to the board, executive director, managers, volunteers and other key people. Such recommendations cannot be prescriptive; they are ideas to be discussed, tested and possibly reshaped by the people who ultimately must implement them.

The team should not be shy about sharing what it has learned or about making recommendations. But, implementation likely will lay with people outside the team. The more that decision makers can be engaged in discussion about the recommendations, the greater the probability of them taking action.

There may also be circumstances in which the team chooses not to make specific action recommendations. Instead, the team may create a list of questions or issues that the organization needs to address, along with suggestions for how that consideration might take place.

The team also should consider whether it has a further role to play. In some organizations, the team will have done its job by guiding the self-assessment process and insuring that the results are broadly communicated. In others, the team may play a continuing role, coordinating the organization's response to the results. The team may want to formulate a specific recommendation in this regard.

> The Leadership Team will have some important insights about potential actions that could be taken

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One of the most important recommendations is that which the team makes to itself. What can members of the team do, in their individual jobs, to respond to what they have learned in this process? How can they change their own behavior? How can they influence others with whom they work? Just as they have modeled a process of data collection and reflection, so too can they model a process of change and continuous improvement.

As Team Leader you have three key roles at this stage in the process:

First, continue your role as facilitator, helping the team reach conclusions and formulate plans and recommendations.

Second, find ways that the team and the organization can celebrate the work that has been done.

Third, insure that loose ends are tied up, that information-sharing happens and that the right information is put into the right hands at the right time.

IN CONCLUSION

The healthiest organizations are those that have learned how to learn. Self-assessment is one of the ways organizations begin that learning.

You have lead a process of reflection and planning that can serve as a model for others in the organization. Take a few minutes when the dust clears to do your own reflection:

◆ **What went well?**

◆ **What didn't?**

◆ **How would you do it differently the next time?**

◆ **What recommendations do you have for the executive director about next steps or continued learning?**

◆ **How will you personally use the results of this process in your own work?**

Finally, take a few more minutes to thank those who participated:

◆ **The Leadership Team members**

◆ **The survey respondents**

◆ **The senior managers and board who were interested in and supportive of the process**

◆ **The executive director who offered you the opportunity to assume this important leadership role**

As appropriate, make sure that participation on the Leadership Team is noted in personnel records or on formal performance reviews.

And, most of all, keep learning!

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About the Author and Contributors

Kenn Allen

Over the past twenty years, Kenn Allen has worked with a wide range of volunteer organizations throughout the United States and around the world. He served as president of VOLUNTEER, the national leadership and resource organization for volunteering in the United States, and as executive director of the National Center for Voluntary Action. Mr. Allen is currently the Senior Vice President for Human Resources/Organizational Development and Administration at The Points of Light Foundation.

Mr. Allen serves as first vice president and board member of the International Association for Volunteer Effort. He has worked with voluntary organizations and businesses in countries as diverse as Russia, England, India, Korea, Singapore, Australia and Venezuela. He is the co-author of two books on the nature and scope of corporate involvement in community service activities and of numerous papers, articles and monographs.

A native of Illinois, he received his B.A. from the University of Illinois at Urbana-Champaign and his M.A. in Human Resource Development from George Washington University. He is a fellow in the Executive Doctorate Program in Human Resource Development at George Washington University. Mr. Allen is currently working on his dissertation on the role of community service in the lives of CEOs of major corporations.

Claudia Kuric

Claudia Kuric, Director of The Points of Light Foundation Changing the Paradigm Program, has over twenty years of experience in the field of organizational development. Her diverse background includes working for the Management Consulting Professional and Organizational Development group of Ernst & Young, one of the world's largest management consulting firms, and with the Northern Rockies Action Group (NRAG), a nonprofit management consulting firm. Her experience also encompasses working with the Montana University System, the Department of Labor and Industry and over 70 nonprofit organizations in the Northern Rockies and the Washington, DC metropolitan area. Ms. Kuric has written three books and dozens of articles and papers on organizational development, education and management issues.

Ms. Kuric has a B.A. in Social Work from the University of Wyoming and a M.F.A. in Writing from George Mason University.

Richard Lynch

Richard Lynch is a Seattle-based management consultant with a variety of clients in North America and England. He works with businesses, nonprofits and local government on matters relating to achieving more results with less cost and effort. He has been a featured speaker on volunteer management at national, international and state conferences since 1979.

Mr. Lynch speaks to approximately 5000 people per year at workshops, conventions and conferences across North America on topics related to personal growth and management effectiveness. He is the author of the books *Precision Management* and *Getting Out of Your Own Way*, and of a monograph called "Developing Your Leadership Potential." He is the co-author of *Essential Volunteer Management* and *The Secrets of Leadership* and is a contributor to professional journals. His latest book, *LEAD!*, was published by Jossey-Bass in January, 1993.

Mr. Lynch holds a master's degree from the University of Iowa.

Stephen H. McCurley

Steve McCurley is an internationally-known trainer and speaker in the field of effective volunteer involvement. He is currently a partner with Sue Vineyard in VM Systems, a management consulting firm.

Mr. McCurley has served as a consultant on volunteer program development with organizations in the United States and Europe. He is a former national board member of the Association for Volunteer Administration.

Each year, Mr. McCurley gives workshops to over 15,000 participants from groups as diverse as the American Hospital Association, the Fraternal Congress of America, the Nature Conservancy and CBS, Inc. He is the author of 8 books, and more than 75 articles on volunteer management, including the best-selling basic text *Essential Volunteer Management*.

Mr. McCurley is a graduate of the University of Georgia and the Northwestern University School of Law, and he now lives in Olympia, Washington.

About The Points of Light Foundation

The Points of Light Foundation, established in May 1990, is a nonprofit, nonpartisan organization governed by a diverse board from the corporate, nonprofit and educational sectors. The Foundation's mission is to engage more people more effectively in volunteer community service to help solve serious social problems. The Foundation is achieving this mission in three ways.

First, the Foundation develops and promotes strategies and methods to recruit and engage more volunteers in direct and consequential community service. Second, the Foundation is working with the nationwide network of over 500 Volunteer Centers to help them become the key community resource in applying volunteering to community needs. Third, the Foundation seeks to increase public awareness of how community service helps to build healthier communities.

CHANGING THE PARADIGM

Self-Assessment Kit
Team Members' Workbook

POINTS OF LIGHT
FOUNDATION

Changing the Paradigm
Self-Assessment Kit

TEAM MEMBERS' WORKBOOK

by

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Senior Vice President

The Points of Light Foundation

with contributions from

Claudia Kuric, Richard Lynch and Stephen H. McCurley

AT&T
Foundation

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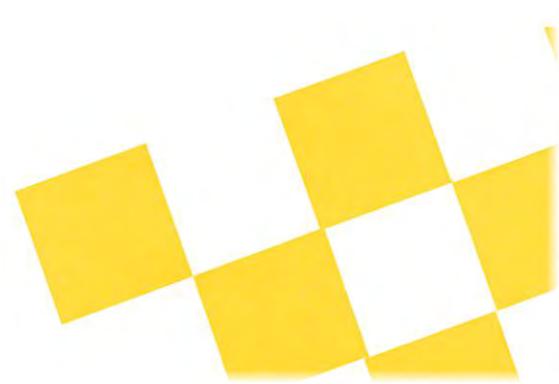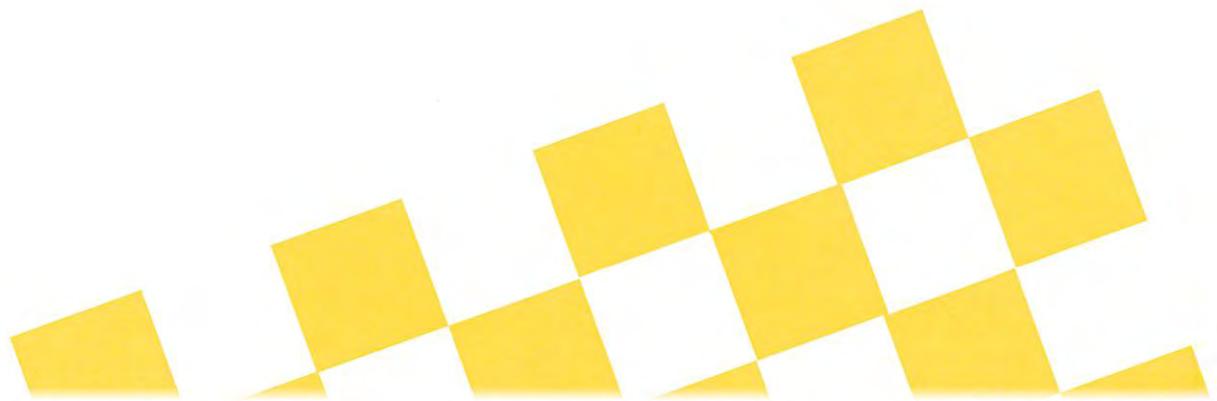
Introduction

Congratulations!

You have been invited by the executive director or board of directors of your organization to be part of the Leadership Team that will conduct a self-assessment process designed to increase the effectiveness with which it involves volunteers.

This workbook introduces you to that process and to the role you will play in it. Please read through this entire workbook carefully before the first meeting of the Leadership Team.

Some Introductory Thoughts

Both nonprofit organizations and local government agencies are under pressure to respond with greater impact to the complex human, social and environmental problems facing our communities. Their work is being done in an atmosphere of increased demand and static resources. There also is a growing expectation on the part of community leaders in business and government, and on the part of the public itself, that volunteers can and should play a role in addressing these problems.

Yet in many organizations, discussions of the work of volunteers falls outside the normal strategic planning or evaluation processes. Though highly valued, the work of volunteers may be seen as separate and distinct from the balance of work done in the organization. As a result, there may be fewer opportunities to:

◆ **Learn about how volunteers and paid staff feel about the involvement of volunteers**

◆ **Identify ways to continuously improve volunteers' involvement**

From an organizational standpoint there are three major reasons for conducting periodic assessments of volunteer programs.

1. **An assessment helps determine how to most efficiently utilize agency resources. Directors of agencies are faced with the need to make critical decisions about scarce resources, determining where the agency should devote its time, energy and funds. The self-assessment survey will identify whether the agency is not getting the most out of volunteer resources, perhaps due to undesir-**

> When volunteers are not involved effectively it both wastes the energy of the staff and may also lead disgruntled volunteers to criticize the agency within the community.

able management practices or through lost opportunities. Some of these weaknesses are of the type that cannot be identified without a systemic examination such as that provided through the self-assessment process.

2. **It will create a more effective volunteer involvement system. The self-assessment process will help to identify where there are specific problems in mission understanding, systems management, roles and relationships, communications and other areas. When volunteers are not involved effectively it both wastes the energy of the staff and may also lead disgruntled volunteers to criticize the agency within the community. Without a self-assessment, you may be faced with a vague feeling that things are not going as well as they should. After the Paradigm self-assessment, you will know exactly what is going wrong and where to devote your own energies to developing solutions.**

3. **The assessment will develop a consensus for needed change. Self-assessment is a process that involves key elements within the agency in examining and evaluating what is happening in volunteer involvement. The process of conducting the assessment creates the evidence for needed changes and builds an interest in, and consensus for, making those changes. The mere process of discussion about the Paradigm characteristics will begin to change attitudes about volunteer involvement.**

A Research Based Approach

In 1992, The Points of Light Foundation undertook ground-breaking research to better understand the ways people are involved as volunteers in human service organizations (health, education, social welfare and grass-roots problem-solving). From that

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research grew the identification of 11 characteristics that differentiate organizations highly effective in involving volunteers from those that are less effective.

Those characteristics were later grouped into the four action principles around which this material has been built:

♦ **Lay the foundation through mission and vision**

♦ **Combine inspiring leadership with effective management**

♦ **Build understanding and collaboration**

♦ **Learn, grow and change**

The most important observations we made about those organizations that were most effective in the involvement of volunteers are:

♦ **In them, the work of volunteers more directly contributes to the mission and priorities of the organization.**

♦ **In them, there is a greater alignment of mission and current priorities with the work being done by volunteers.**

The action principles and the characteristics underlying them explain why that is true. The purpose of the self-assessment process is to help organizations understand how they can move toward that same degree of alignment.

The Self-Assessment Process

We have shared these research findings with hundreds of local and national nonprofit organizations; local, state and federal government agencies; and both private and public funders. We have found that the work we did and the conclusions we drew have a high degree of "face validity" — that is, they make sense to people.

But sharing the research also elicits one persistent question, "How can we find out how our organization measures up against the characteristics of high effectiveness identified in the research?"

The process described in this booklet answers that question. It is based on the assumption that, with guidance, people can reflect on and learn about the way their organization works. We

The mere process of discussion about the Paradigm characteristics will begin to change attitudes about volunteer involvement.

believe that it is possible to collect and analyze data, discuss it, and turn the fruits of that work into knowledge that can help the organization do a better job.

The process is built around three broad components:

1. **A Leadership Team, of which you are a member, that is representative of the board of directors, management, line staff and volunteers of your organization. The purpose of this team is to lead the way through the process. It reports to the executive director.**

2. **The survey instrument that will be given to a sample of all paid staff and volunteers. In some organizations, it may be possible to survey everyone; in very large organizations, perhaps only a representative sample will be selected.**

3. **Analysis and discussion of the results of the survey by the team and then throughout the organization. The data becomes an opportunity to identify and work on barriers to effective volunteer involvement. This is the first step toward developing an action agenda of steps to increase the effectiveness of volunteer involvement in your organization.**

The Leadership Team

The Leadership Team leads the organization through the self-assessment process by:

♦ **Planning the overall effort**

♦ **Building support for the process throughout the organization**

♦ **Analyzing the results of the survey**

♦ **Stimulating dialogue throughout the organization about how best to use those results**

Members may also help administer and compile the survey. The executive director has appointed a Team Leader who is responsible for managing and facilitating the work of the team.

Most of the work of the team will be done in meetings, but you also will be required to do some reading and analysis on your own and perhaps talk with others in the organization about the process and its results.

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About This Workbook

This workbook has been designed as the primary resource tool to support your work. It is part of a larger kit of materials and supplies that you and the Team Leader will use. This workbook includes five sections in addition to this introduction:

◆ **About the Changing the Paradigm Project**

◆ **Creating a Plan**

◆ **Building Internal Support**

◆ **Analyzing the Data**

◆ **Determining the Next Steps**

Thank you for assuming a leadership role as a member of the team. Organizations that will not only survive but thrive in the years ahead will be those that know how to learn and that are committed to continuous improvement in their work processes. Self-assessment is a key element of learning and continuous improvement.

At its simplest, self-assessment is asking the question, "How are we doing?" At its best, it asks that question in ways that provide useful data and a framework within which that data can be converted into action that helps the organization perform better.

This particular self-assessment process is focused on one component of your organization, the involvement of volunteers. But because organizations are systems composed of interdependent parts, you also will be learning about how the organization works for everyone in it, including your customers. Assessing one aspect of the organization will give you insight into many.

Your job is to help make this the best possible process for your organization and to encourage everyone to actively participate.

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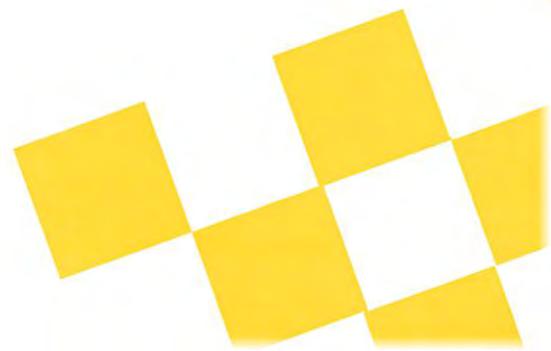
About The *Changing The Paradigm* Project

The mission of The Points of Light Foundation is:

To engage more people more effectively in volunteer community service aimed at solving serious social problems.

This mission recognizes that it is not sufficient simply to motivate more people to serve. Rather, organizations that utilize volunteers must be equally concerned with the effectiveness of their involvement.

In 1991, The Foundation launched its Changing the Paradigm Project to explore new ways of increasing the effectiveness of nonprofit organizations and public agencies in involving volunteers. The name of the project grew from the recognition that one of the key barriers to effective volunteer involvement is the paradigm, or way of viewing the world, that people and organizations have about the appropriate roles of volunteers.

The first phase of the project was to learn about the internal dynamics of organizations with regard to volunteers. Research focused on human service organizations, including schools and other educational programs, hospitals and other health care organizations, social service organizations and grassroots, community-based organizations.

The research team interviewed more than 400 people in 20 such organizations, both nonprofit and public sector, in five geographically diverse communities. Those interviewed included both paid staff and volunteers. They were:

◆ **Members of boards of directors and committees**

◆ **Execntive directors**

◆ **Senior managers**

◆ **Mid-level managers**

◆ **Volunteer coordinators**

◆ **Helping professionals (including teachers, nurses, doctors, social workers and counselors)**

◆ **Volunteers serving in policy-making, advisory, direct service, fundraising, advocacy, program management and support roles**

What emerged from the research was a clearer understanding of why some organizations are more effective than others in engaging volunteers in their work. Effectiveness in this case is defined as the extent to which the work of volunteers directly contributes to the mission and priorities of the organization.

Eleven characteristics of high effectiveness were identified and described. These later were grouped into the four action principles on which this self-assessment process is based and which are described on the next four pages.

The process in which you are about to participate was created in close collaboration with Volunteer Centers and local organizations in four communities throughout the country. The survey instrument and the process have been thoroughly tested.

The following material summarizes each of the four action principles and the characteristics of effectiveness which are part of them. Additional information on the research, the principles and the characteristics can be found in two research reports included in the *Changing the Paradigm Self-Assessment Kit.* That material is available through your team leader.

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Action Principle #1

Lay the Foundation through Mission and Vision

1. **The mission and priorities of the organization are framed in terms of the problem or issue the organization is addressing, not its short-range institutional concerns.**

   When organizations are "keeping their eye on the prize" — that is, on the core problem or task for which they were created — they also tend to involve volunteers in more meaningful, in-depth roles. Both leaders and workers talk about the importance of the work to be done, not focusing first and foremost on the immediate impediments to accomplishing that work.

2. **There is a positive vision — clearly articulated, widely shared and openly discussed throughout the organization — of the role of volunteers.**

   Both paid staff and volunteers unselfconsciously discuss the role of volunteers in terms of fundamental organizational values and philosophy. There is a positive view of volunteers shared throughout the organization.

3. **Volunteers are seen as valuable human resources that can directly contribute to achievement of the organization's mission, not primarily a means to obtaining financial or other material resources.**

   Organizations that see their problems as primarily financial often limit the roles volunteers can play, pigeonholing them in resource-generating activities. In organizations that focus first and primarily on the work to be done, volunteers not only contribute to that work but also contribute to obtaining other needed resources.

Successes in Changing the Paradigm

The Paradigm Process opens up communication between volunteers and staff. It enables staff to see blind spots and encourages dialogue between staff and volunteers about how the volunteers could be more effectively involved.

In one Volunteer Center, for example, the self-assessment questions brought to the surface things that volunteers had been thinking about for years. Two of them, in discussing their reaction to the questions, had the idea of hosting a meeting of volunteers. The volunteers met and came up with ideas for improving the volunteer program. These were then presented to the staff. As a result of these ideas, many changes were made.

To the surprise of the staff, volunteers reported that they did not feel treated as equals in the agency. They pointed out that they had never been given the option of going to staff meetings. Staff stated they never knew the volunteers wanted to come to staff meetings. Volunteers noted that this was indicative of a lack of communication in the agency, and pointed to other examples. As a consequence, staff began to treat volunteers as equal partners. Volunteers were invited to staff meetings. They were also asked for feedback on the operation of the agency, what training they wanted, and if there were other jobs they would like to do.

Another suggestion was that staff evaluate volunteer performance. Again, staff found this request surprising, since they had assumed volunteers would not want to be evaluated. Volunteers responded that they were never sure how they were doing, and they wanted staff to tell them.

Volunteers noted that staff was overworked and that volunteers could help relieve them of that workload. Staff's response was that they didn't see how the volunteers could help out with the technical details of their jobs. Volunteers told the staff that they felt they had lots of 'hidden' skills that staff didn't know about. This led to a re-interviewing of present volunteers to uncover other skills and involve them in new capacities. An example was that volunteers began to be involved in helping recruit volunteers.

Although the Volunteer Center endorsed the importance of nonprofit agencies having a volunteer coordinator, it did not have one itself. The self-assessment questions caused volunteers to wish they had a designated staff person to go to with their ideas about the volunteer program. As a consequence, one of the staff was assigned as a volunteer liaison.

Volunteers also pointed out additional training they would like to have to do their jobs better. They also volunteered to train new volunteers of the center.

They suggested that the board was not aware of the day-to-day contribution of volunteers and suggested that a current board member get involved or that a present volunteer be elected to the board. These and other suggestions led the staff to realize that they had not been communicating with the volunteers on a regular and sufficient basis.

Action Principle #2

Combine Inspiring Leadership with Effective Management

4. **Leaders at all levels — policy-making, executive and middle management — work in concert to encourage and facilitate high-impact volunteer involvement.**

   Each leader contributes in the way that is appropriate to his or her role within the organization. Most importantly, all contribute, relieving the need for heroic leadership on the part of any individual.

5. **There is a clear focal point of leadership for volunteering, but the volunteer management function is well-integrated at all levels and in all parts of the organization.**

   The nature of that focal point varies from organization to organization. It may be but is not always the volunteer coordinator. When it is the volunteer coordinator, they will describe their role of being resource people or internal consultants, helping other staff manage volunteers effectively. Decision-making about the nature and scope of volunteer involvement happens as close to the action as possible.

6. **Potential barriers to volunteer involvement — liability, confidentiality, location of the organization, hours of operation, etc. — are identified and dealt with forthrightly.**

   These false barriers mask or rationalize deeper-seated resistances to involving volunteers. More effective organizations resolve these issues instead of simply talking about them.

Successes in Changing the Paradigm

In another organization, the Paradigm Self-Assessment Process showed the board and staff they weren't as sensitive to the needs of volunteers as they thought they were. One direct result of the assessment — the organization hired a volunteer coordinator. Also, board and staff leadership made a commitment to address the issues brought up by the assessment.

One of the main duties of the newly-hired volunteer coordinator was to work on an enhanced recruitment and recognition strategy for the volunteers. As one staff person stated, "As lack of appreciation was identified by volunteers in the self-assessment we noticed the importance of creating ways to appreciate volunteers." Another duty for this coordinator (indicated as needed from the assessment) was the creation of sensitivity training for staff who work with volunteers.

The coordinator has initiated several recognition strategies including restructuring the annual volunteer awards event and sending birthday cards to volunteers with personal signatures from both the volunteer coordinator and the volunteers' respective caseworker.

In the past, the organization's volunteer recognition was an informal activity whose main focus was to have fun. For last year's volunteer recognition activity, the volunteers met at the local zoo, had a picnic, then toured the zoo. This year, the volunteer coordinator has planned a formal banquet in which the focus will be on recognizing the volunteers' efforts. The goal of this event is to give the volunteers a sense of the meaning of their work and to show the organization's appreciation of them.

A youth organization had a similar experience in overcoming blind spots. In this case, staff were surprised to learn (from the self-assessment results) that their volunteers did not feel that staff communicated with them very well. This led to renewed efforts to seek volunteer opinions and to communicate program direction.

Action Principle #3

Build Understanding and Collaboration

7. **Paid staff are respected and are empowered to fully participate in planning, decision-making and management related to volunteer involvement.**

   The paid staff and their work are described by executives in positive, respectful terms. Paid staff are seen as competent professionals able to design and manage much of their own work and to appropriately and effectively incorporate volunteers.

8. **There is a conscious, active effort to reduce the boundaries and increase the teamwork between paid and volunteer staff.**

   Conscious attempts are made to strengthen the working relationship between paid and volunteer staff, to foster collegiality and to promote the sense of working together on a team toward a common goal. Barriers to interaction or policies and practices that foster inequity are recognized, and attempts are made to lessen their impact.

9. **Success breeds success as stories of the contributions of volunteers both historically and currently are shared among both paid and volunteer staff.**

   When paid staff tell positive stories about the work of volunteers, it influences other paid staff to reframe their attitudes about volunteers. This leads to new opportunities in which volunteers can demonstrate their value. Often these stories are about the historical role of volunteers in the organization or about the response of volunteers in times of organizational crisis.

Successes in Changing the Paradigm

One of the consequences of the Paradigm Self-Assessment Process is that the very act of engaging people in a discussion of the role of volunteers can make a change in the attitude of both staff and volunteers. A hospital which used the Paradigm Self-Assessment found that it led volunteers to behave more assertively about their needs and about how they could make a more productive contribution. The director of volunteer services found that the volunteers frequented her office more and gave more feedback on what needed to happen.

One of the outcomes of this was a reduction of waiting time for patients. Staff thought that volunteers might be holding things up by moving too slowly. Volunteers timed the whole process to show that the fault was in the system. In their analysis of the steps in the process, volunteers identified new volunteer opportunities that would speed things up at each stage. Medical staff were impressed with this and began asking volunteers "How can we do this?" as they continued to work on the problem.

At the same hospital, construction closed the unit where volunteers got ice for patients. Engineering agreed to deliver ice twice a day. Volunteers did not believe that was enough and figured out a way to get ice from another unit.

Sometimes the outcomes of the assessment process are unintentional. At another hospital, the Changing the Paradigm Process encouraged the director of volunteers to think about involving volunteers in non-traditional, high-impact ways. She discussed this with an account representative from a pharmaceutical company who suggested that she try to recruit volunteers from the ranks of companies that did business with the hospital.

With this in mind, the two of them went to the director of purchasing for the hospital. They asked him a number of questions, such as "What are the top twenty vendors in order of the dollar volume of business they do with the hospital?" The director of purchasing had no way to gather this information and immediately saw that this (and other questions the account rep asked that he couldn't answer) were important pieces of information. As the two of them discussed this, the purchasing manager realized that if he had the answer to these questions he would be able to do a better job of purchasing things for the hospital. The conversation with the volunteer led to a whole new way of looking at purchasing and opened up the possibility of making their process more efficient.

When the purchasing manager next saw the director of volunteers, he said "Wow, where did you get someone like that to volunteer?" As he told his story to fellow staff, their attitudes about what volunteers could do in their departments expanded to include volunteers working in highly professional capacities. This paved the way for staff acceptance of volunteers working in these areas.
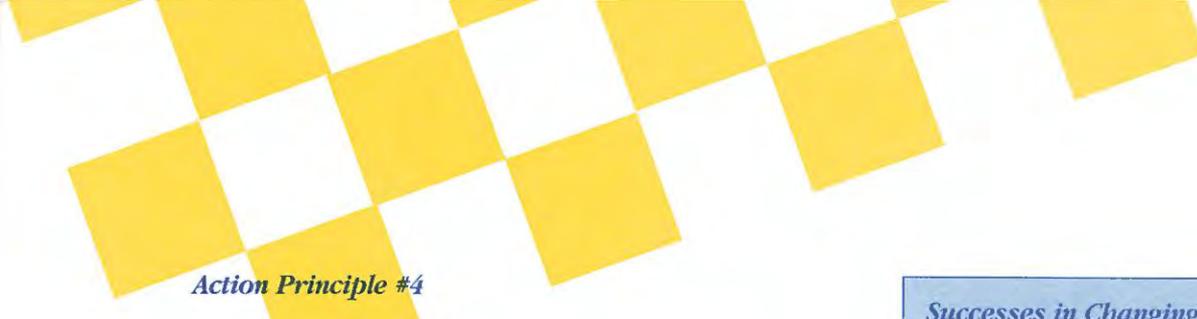
9

10. **There is an openness to the possibility for change, an eagerness to improve performance and conscious, organized efforts to learn from and about volunteers' experiences in the organization.**

    Organizations use a variety of techniques to try to learn as much as possible about their volunteers, what motivates them, and the quality of their experience with the organization. Change is seen as an opportunity, not as a burden.

11. **There is a recognition of the value of involving, as volunteers, people from all segments of the community, including those the organization seeks to serve.**

    The "more effective" organizations give more attention to understanding and responding to the growing diversity of American society. These organizations struggle more openly with how they can increase the involvement of people who typically do not volunteer to work with them.

Successes in Changing the Paradigm

The Paradigm Self-Assessment Process can also validate what organizations already believe to be true about their strengths and areas of growth. One such organization found that the self-assessment results gave them more conviction in following the direction they were headed. Specifically, it reinforced their commitment to look at ways to provide more opportunity for personal and team growth for the volunteers. The assessment also gave them a renewal of energy to continually improve the quality of services provided to volunteers.

That same organization did find disparate beliefs among staff, board and other volunteers in two major areas: diversity and vision for engaging volunteers. In dialogues initiated as a result of the self-assessment, staff found that although they were all committed to engaging youth volunteers, they had different assumptions on how the organization intended to do that. This pointed out the need for more discussions with staff, board and other volunteers on developing an implementation strategy.

The self-assessment also indicated that the organization needed to address diversity issues among the volunteers. In subsequent conversations among staff and volunteers, some of the volunteers stated they felt they were treated as second-class citizens. Staff realized their volunteer recognition strategies did not account for the ethnic and cultural interpretations of appreciation. The result: the director demonstrated her personal commitment to addressing diversity by asking the volunteers to come up with better ways the organization could show appreciation. The director also increased the time she spent talking to the volunteers.

The organization formalized their commitment to dealing with diversity by adding it to their strategic plan. They also committed to two major strategies: diversifying the volunteer pool to reflect diversity in the county and addressing new ways to recruit the targeted populations.

10

Creating A Plan

One of the principal roles of the Leadership Team is to work with the Team Leader to develop a plan for the self-assessment process. It should include provision for the following activities:

♦ **Explaining the self-assessment process to the rest of the organization**

♦ **Deciding which people to ask to complete the survey and determining how best to get the maximum response**

♦ **Making sure that you, as a team member, help tabulate the survey if you wish**

♦ **Meeting again as a full team to discuss the results and plan what comes next**

An essential part of the plan is a realistic timetable for completion of the work. Because this is a rather straightforward process, the timetable should be relatively short so as to sustain interest within the organization.

Here are four key questions the team should answer as it creates the plan.

1. What is the best way to let paid staff and volunteers know about the self-assessment process? How can information about the process be shared without creating anxiety about whether individuals are being evaluated?

2. What is the best way to get a cross-section of people to complete the survey: members of the board of directors, paid staff at all levels and in all program areas, and direct service and support volunteers in all program areas? What is the best way to distribute and collect surveys? Based on the size of the organization, how many people should be surveyed?

3. What roles should members of the team play in the following tasks?

♦ Telling the organization about the process
♦ Selecting the people to complete the survey
♦ Distributing and collecting the survey
♦ Tabulating the survey

4. When should each of these tasks be completed?

11
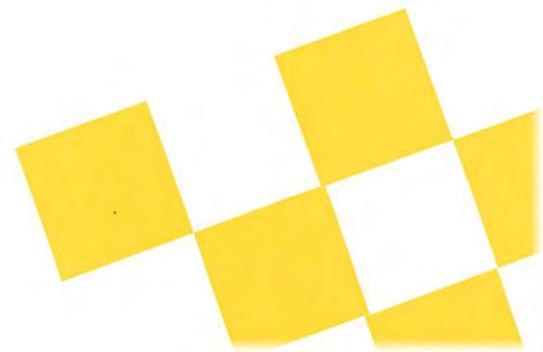
Building Internal Support

The fact that you have come this far suggests that there is support for the self-assessment process on the part of the executive director and the board of directors. But it is equally important that everyone else in the organization understand the process and the anticipated outcomes.

A role of the Leadership Team is to work with the Team Leader to design a way to communicate with everyone in the organization about the self-assessment process, both to share information and to allay any concerns there might be about the process.

> People especially need to understand that they as individuals are not being evaluated.

People especially need to understand that they as individuals are not being evaluated. Rather, the process is designed to collect information about how paid staff and volunteers perceive the behavior of the organization in relation to the involvement of volunteers. The value of the process is not in establishing a judgmental "score" about that behavior but rather in the discussion within the organization that can be stimulated by the data.

When people get together to talk about how to improve the process of their work, good things usually happen. The data collection and analysis is a way to begin that discussion.

Three groups of people need to be informed about the self-assessment process: managers, other paid staff and volunteers. Your team will know best how to effectively communicate with those groups.

Here are several key points you may want to make with these groups:

♦ The purpose of the self-assessment is to help the organization more effectively involve volunteers in its work by understanding how paid staff and volunteers currently assess the behavior of the organization.

♦ People from throughout the organization will be asked to participate as a way of getting the most complete picture of how the organization operates with respect to its volunteers.

♦ Only a few minutes will be needed to read and complete the survey.

♦ All responses are anonymous and confidential. Only tabulated data will be reported.

♦ Everyone in the organization will learn the results and have the opportunity to react or participate in further discussion.

A fact sheet stating these points can be distributed, but just as important is that you talk with people about the process, so that they understand the process and support it. General staff meetings or departmental meetings are excellent vehicles for doing this. Remember that each of the three target groups: managers, other paid staff and volunteers will have different questions and concerns; they may also have different forms of resistance and different levels of interest. Building an understanding of the self-assessment process creates an openness to considering the results later.

On the next page are some questions to guide your planning on building internal support.

12

1. What is the best way to communicate with the following groups within our organization?

   ◆ Senior managers:

   ◆ Middle managers:

   ◆ Line workers:

   ◆ Leadership volunteers (board members, advisory committees and volunteers in management roles):

   ◆ Direct service volunteers:

2. What role, if any, should the executive director play in this communication?

3. What role should members of the Leadership Team play?

As part of your planning, the team will have decided who should receive the survey instrument, how it will be distributed and what role, if any, team members will have in tabulating the results. The next section assumes completion of those tasks and focuses on the process of analyzing the data.

13
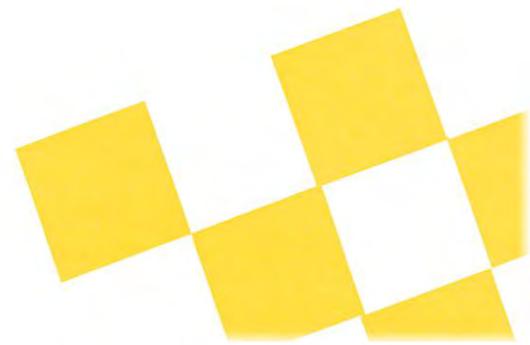
Analyzing the Data

At the heart of the self-assessment process is the analysis and discussion of the results. The Leadership Team must review and react to the data, discuss its implications and formulate recommendations based on it.

The Team Leader will provide you, in advance, with the tabulation of the survey results. It is important that you review them prior to your meeting.

The surveys will have resulted in a single composite score for each action principle, plus scores for each of the three stakeholder groups (board of directors, paid staff, other volunteers) for each principle. You also will have scores for each of the 24 statements on the survey.

- ◆ **The single composite score tells you how the total group who responded feels about the organization's performance on that principle.**

- ◆ **The group scores allow you to see how each stakeholder feels about the organization's performance on that principle.**

- ◆ **The scores for each statement allow you to see specific behaviors that may need to be altered or reinforced.**

All three scores are important.

- ◆ **Low overall scores reflect a consensus about areas in which the organization may wish to concentrate in improving the way it works.**

- ◆ **Wide gaps in group scores reflect points on which there are very different perceptions. These may represent very different experiences among the stakeholder groups, ones that harbor points of contention among them that are in need of attention.**

- ◆ **Scores on the specific statements may vary widely. Again, look for very low scores or places where there is a great difference among the groups.**

Examples of Interpreting Scores:

Low Overall Scores

Consider the following set of total scores for the four action principles:

	Staff	Volunteers	Leadership
Lay the Foundation	24.9	24.3	24.9
Leadership and Management	20.6	21.7	22.3
Building Understanding	23.5	23.7	23.7
Learn, Grow and Change	23.6	23.5	24.1

In this case the scores for the second action principle, "Combine Inspiring Leadership with Effective Management" are much lower for all three groups of respondents than are the scores for the other action principles. This could indicate a consensus that the structure of the volunteer management system is not perceived as being effective or well-operated.

Wide Gaps in Scores

Suppose that the responses for question #1 are as follows:

	Staff	Volunteers	Leadership
1. Everyone involved with the organization has a clear idea of the role volunteers should play in the organization.	3.1	4.2	3.8

Note the extreme gap between the response of staff and of the other two groups. If most staff do not currently work with volunteers, this score might indicate that information about the volunteer program and its accomplishments are not being well communicated to paid staff. If most staff are working with volunteers, this low score might indicate dissatisfaction felt by staff about their relationship with volunteers (which you could double-check by looking at questions #14 and #16) and could indicate the need for better role clarification or trouble-shooting.

Varying scores on specific statements

You might notice patterns or differences in specific questions. What if the general range of responses for questions #19, 21, 22, 23 and 24 ("Learn, Grow, and Change") were from 3.7 to 4.5 and the responses for question #20 were:

	Staff	Volunteers	Leadership
20. Volunteers are regularly asked to evaluate their involvement in the organization, including the way they are managed.	2.9	3.0	3.5

In this case you would note both the variance in the responses to this question versus the other questions in this action principle and also the difference between the scores for leadership volunteers versus the other two groups.

On pages 15-18 are worksheets to help structure your discussion of each action principle in light of the survey results. The Team Leader will facilitate this discussion.

Action Principle #1

LAY THE FOUNDATION THROUGH MISSION AND VISION

1. How do you feel about the scores from each group and the composite score? Do they fit with the experience and perceptions of the members of the team? Do the scores seem low, high or about right to you?

2. In the space below, write down what you think the mission is of your organization. What are the major points of difference among team members? How often is the organization's mission discussed with staff? with volunteers? by the board of directors?

3. What are the three or four most important priorities of the organization? How does work now being done by volunteers relate to those priorities? Is there a close match, or does the work of volunteers seem irrelevant to those priorities?

4. How much of the work of volunteers fits into each of these categories:

   ◆ Work other than fundraising that directly supports mission and priorities

   _____%

   ◆ Fundraising _____%

   ◆ Work that may be useful but does not directly support the mission and priorities

   _____%

   [Note: In the most effective organizations, volunteers may play an important role in fundraising but also work in a variety of ways to directly support mission and priorities.]

5. Look at the scores for each of the survey statements within this action principle (Statements 1-6). Which are the lowest? Why might they be so low? What can be done to raise them?

6. Brainstorm ways in which the work of volunteers could more directly support the mission and priorities.

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Action Principle #2

COMBINE INSPIRING LEADERSHIP WITH EFFECTIVE MANAGEMENT

1. How do you feel about the scores from each group and the composite score? Do they fit with the experience and perceptions of the members of the team? Do the scores seem low, high or about right to you?

2. What roles do each of these groups play in promoting and supporting volunteer involvement? Who among these groups energizes volunteers in the organization?

    ◆ Board of directors:

    ◆ Executive director and other senior managers:

    ◆ Middle managers:

3. To what extent are the primary volunteer management functions—recruitment, placement, training, supervision, evaluation and recognition—the responsibility of the paid staff with whom volunteers work most directly?

4. What are the primary barriers to more effective volunteer involvement in the organization?

5. Look at the scores for each of the survey statements within this action principle (Statements 7-12). Which are the lowest? Why might they be so low? What can be done to raise them?

6. Brainstorm ways in which these barriers can be reduced.

Action Principle #3

BUILD UNDERSTANDING AND COLLABORATION

1. How do you feel about the scores from each group and the composite score? Do they fit with the experience and perceptions of the members of the team? Do the scores seem low, high or about right to you?

2. Who makes the decisions about how, when and where volunteers are involved? Are these decisions made as close to the action as possible?

3. In what ways are the concerns of paid staff about volunteers addressed? Do they have the opportunity to discuss how volunteers affect their own roles and how they do their jobs? How could such opportunities be expanded or enhanced?

4. What are the best stories you can think of about the contributions volunteers make to the organization? Are these stories widely known by paid staff and volunteers? How can they best be spread?

5. Look at the scores for each of the survey statements within this action principle (Statements 13-18). Which are the lowest? Why might they be so low? What can be done to raise them?

6. Brainstorm ways in which teamwork between paid staff and volunteers can be made stronger.

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Action Principle #4

LEARN, GROW AND CHANGE

1. How do you feel about the scores from each group and the composite score? Do they fit with the experience and perceptions of the members of the team? Do the scores seem low, high or about right to you?

2. Does the organization consider its volunteers to be customers of the organization? If so, how does it go about learning the interests and needs of these customers? How does it seek to satisfy those needs?

3. How does the organization learn from the experiences of its volunteers? Are regular volunteers debriefed often? Do volunteers who conclude their service participate in an exit interview? How is data gathered from such activities shared in the organization? How could this learning be increased?

4. To what extent do the volunteers reflect the ethnic, racial, economic, age and gender make-up of the community being served? Are people the organization seeks to serve also involved as volunteers?

5. Look at the scores for each of the survey statements within this action principle (Statements 19-24). Which are the lowest? Why might they be so low? What can be done to raise them?

6. Brainstorm ways in which volunteers from the entire community can be attracted to service in the organization.

Determining the Next Steps

Collecting, analyzing and discussing data from a survey are only the first few steps in a self-assessment process. The important part of the process is what happens after the discussion—the ways in which the organization responds to the data, the commitment made to improving performance and the specific action taken.

The role of the Leadership Team now is twofold:

- ◆ **Share the results of the survey throughout the organization**

- ◆ **Recommend actions that might be taken in response to the survey**

Sharing the Results

It is essential that the results of the survey be shared with everyone in the organization. Doing this incrementally will allow the organization to respond promptly.

Here is how one organization did it:

1. The Leadership Team met with the executive director and reviewed results, analysis and recommendations.

2. The executive director, the Team Leader and a member of the team presented results to senior managers, engaging them in a discussion and gaining their support for the next steps.

3. The executive director and the Leadership Team made a presentation to the board of directors, led by the board's representative to the team. The result was an enthusiastic sign-off by the board on the proposed next steps and a commitment to explore how the results could contribute to improving the board's own effectiveness.

4. Presentations were made by members of the team at department meetings, involving both paid staff and volunteers. These were done in collaboration with senior managers and became the first step in each department's plans to increase the effective engagement of volunteers.

5. Information about the self-assessment process results and the proposed next steps was included in the organization's newsletter. This newsletter was sent to all paid staff and volunteers, as well as members of the community.

Your job now is to answer this: "What is the most appropriate and effective way we can share the results of the survey with our colleagues throughout the organization?"

> Recommendations cannot be prescriptive; they are ideas to be discussed, tested and possibly reshaped.

Recommending Next Steps

Because your team has been immersed in the results, you will have some important insights about possible actions to more effectively engage volunteers in the organization. Working together, you need to formulate those insights into specific recommendations to the board, executive director, managers, volunteers, etc. Such recommendations cannot be prescriptive; they are ideas to be discussed, tested and possibly reshaped by the people who ultimately must implement them.

The team should not be shy about sharing what it has learned or about making recommendations. But, you should remember that responsibility for implementation of these recommendations likely will lay with people outside the team. The more the team can engage decision makers in discussion, the greater the probability of them taking action.

There may also be circumstances where the team will choose not to make specific action recommendations. Instead, you may decide to put forward a list of questions or issues that need to be addressed and suggest a process through which this consideration might take place.

The team also should consider its future role, if any. In some organizations, the team will have done its job by guiding the self-assessment process and insuring that the results are broadly communicated. In others, the team may then coordinate the organization's response to the survey results. You may want to formulate a specific recommendation in this regard but, of course, be careful what you wish for, since you might get it!

One of the most important recommendations is that which the team makes to itself. Just as you have modeled a process of data collection and reflection, now you can model a process of change and continuous improvement.

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What can you, as individuals, do to respond to what you have learned in this process?

How can you influence others with whom you work?

What are three specific things you can do to help increase the organization's effectiveness in engaging volunteers?

How can you change your own behavior with regard to the involvement of volunteers?

1.

2.

3.

IN CONCLUSION

Thanks!

The healthiest organizations are those that have learned how to learn. Self-assessment is one of the ways organizations begin that learning.

You have given leadership to a process of reflection and planning that can serve as a model for others in your organization. Take a few minutes now, individually and as a team, to do your own reflection on the process and the work you have done.

What went well?

What didn't?

How would you do it differently the next time?

What did you learn from this project about working in a team?

How can you continue the process of learning and continuous improvement in your own area of the organization?

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About the Author and Contributors

Kenn Allen

Over the past twenty years, Kenn Allen has worked with a wide range of volunteer organizations throughout the United States and around the world. He served as president of VOLUNTEER, the national leadership and resource organization for volunteering in the United States, and as executive director of the National Center for Voluntary Action. Mr. Allen is currently the Senior Vice President for Human Resources/Organizational Development and Administration at The Points of Light Foundation.

Mr. Allen serves as first vice president and board member of the International Association for Volunteer Effort. He has worked with voluntary organizations and businesses in countries as diverse as Russia, England, India, Korea, Singapore, Australia and Venezuela. He is the co-author of two books on the nature and scope of corporate involvement in community service activities and of numerous papers, articles and monographs.

A native of Illinois, he received his B.A. from the University of Illinois at Urbana-Champaign and his M.A. in Human Resource Development from George Washington University. He is a fellow in the Executive Doctorate Program in Human Resource Development at George Washington University. Mr. Allen is currently working on his dissertation on the role of community service in the lives of CEOs of major corporations.

Claudia Kuric

Claudia Kuric, Director of The Points of Light Foundation Changing the Paradigm Program, has over twenty years of experience in the field of organizational development. Her diverse background includes working for the Management Consulting Professional and Organizational Development group of Ernst & Young, one of the world's largest management consulting firms, and with the Northern Rockies Action Group (NRAG), a nonprofit management consulting firm. Her experience also encompasses working with the Montana University System, the Department of Labor and Industry and over 70 nonprofit organizations in the Northern Rockies and the Washington, DC metropolitan area. Ms. Kuric has written three books and dozens of articles and papers on organizational development, education and management issues.

Ms. Kuric has a B.A. in Social Work from the University of Wyoming and a M.F.A. in Writing from George Mason University.

Richard Lynch

Richard Lynch is a Seattle-based management consultant with a variety of clients in North America and England. He works with businesses, nonprofits and local government on matters relating to achieving more results with less cost and effort. He has been a featured speaker on volunteer management at national, international and state conferences since 1979.

Mr. Lynch speaks to approximately 5000 people per year at workshops, conventions and conferences across North America on topics related to personal growth and management effectiveness. He is the author of the books *Precision Management* and *Getting Out of Your Own Way*, and of a monograph called "Developing Your Leadership Potential." He is the co-author of *Essential Volunteer Management* and *The Secrets of Leadership* and is a contributor to professional journals. His latest book, *LEAD!*, was published by Jossey-Bass in January, 1993.

Mr. Lynch holds a master's degree from the University of Iowa.

Stephen H. McCurley

Steve McCurley is an internationally-known trainer and speaker in the field of effective volunteer involvement. He is currently a partner with Sue Vineyard in VM Systems, a management consulting firm.

Mr. McCurley has served as a consultant on volunteer program development with organizations in the United States and Europe. He is a former national board member of the Association for Volunteer Administration.

Each year, Mr. McCurley gives workshops to over 15,000 participants from groups as diverse as the American Hospital Association, the Fraternal Congress of America, the Nature Conservancy and CBS, Inc. He is the author of 8 books, and more than 75 articles on volunteer management, including the best-selling basic text *Essential Volunteer Management.*

Mr. McCurley is a graduate of the University of Georgia and the Northwestern University School of Law, and he now lives in Olympia, Washington.

About The Points of Light Foundation

The Points of Light Foundation, established in May 1990, is a nonprofit, nonpartisan organization governed by a diverse board from the corporate, nonprofit and educational sectors. The Foundation's mission is to engage more people more effectively in volunteer community service to help solve serious social problems. The Foundation is achieving this mission in three ways.

First, the Foundation develops and promotes strategies and methods to recruit and engage more volunteers in direct and con-sequential community service. Second, the Foundation is working with the nationwide network of over 500 Volunteer Centers to help them become the key community resource in applying volunteering to community needs. Third, the Foundation seeks to increase public awareness of how community service helps to build healthier communities.

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Changing the Paradigm
Self-Assessment Survey

Please indicate whether you are a:

☐ Board or advisory committee member?

☐ Paid staff member?

☐ Volunteer other than on a board or committee?

☐ Other: _____

For each of the statements below, indicate how frequently you believe the statement is true for this organization. Record the number value for each of your responses in the space to the left of the statement. Please tabulate answers on back.

Almost Never	Occasionally	Sometimes	Often	Almost Always
1	2	3	4	5

_____ 1. Everyone involved with the organization has a clear idea of the role volunteers should play in the organization.

_____ 2. People throughout the organization believe that volunteers are making a positive contribution.

_____ 3. The jobs done by volunteers contribute directly to achieving the current priorities of the organization.

_____ 4. The work that volunteers are asked to do includes many jobs other than fundraising.

_____ 5. Volunteers at all levels feel respected and valued by the organization.

_____ 6. When the work of the organization is discussed, it is in terms of the community problems we are trying to solve rather than our immediate organizational problems.

_____ 7. The board of directors actively encourages the involvement of volunteers in all aspects of the organization's work.

_____ 8. The executive director of the organization actively encourages the involvement of volunteers in all aspects of the organization's work.

_____ 9. Managers of the organization's programs agree on the importance of involving volunteers throughout the organization.

_____ 10. There is a person who plays a primary leadership role in promoting and organizing volunteering in the organization.

_____ 11. The people actually doing the primary work of the organization are responsible for supervising volunteers as part of their jobs.

_____ 12. Obstacles to volunteer involvement are viewed as problems to be solved rather than as excuses.

_____ 13. Those people who actually deliver the services or manage the programs of the organization have the responsibility for deciding whether and how volunteers will be involved with them.

_____ 14. Volunteers and paid staff work well together as a team.

_____ 15. Paid staff at all levels feel respected and valued by the organization.

_____ 16. Tensions or problems between paid staff and volunteers are acknowledged and dealt with in a positive way.

_____ 17. Stories of the contributions of volunteers are told by both paid staff and other volunteers.

_____ 18. The work of volunteers may be different from that of paid staff but it is not viewed as inferior.

_____ 19. The organization strives to continually improve the management of volunteers.

_____ 20. Volunteers regularly are asked to evaluate their involvement in the organization, including the way they are managed.

_____ 21. When looking at work that needs to be done, deliberate efforts are made to find jobs for volunteers.

_____ 22. People whom the organization serves are also involved as volunteers within the organization.

_____ 23. The organization tries to recruit volunteers who will reflect the diversity of the community – age, race, income level, etc.

_____ 24. People in the organization are interested in learning ways to involve volunteers more effectively.

CHANGING THE PARADIGM

Scoring Sheet

Now, copy your answers in the spaces below corresponding to the number of each question, and then total each column:

I.		II.	
1. ____		7. ____	
2. ____		8. ____	
3. ____		9. ____	
4. ____		10. ____	
5. ____		11. ____	
6. ____		12. ____	

Total ____   **Total** ____

III.		IV.	
13. ____		19. ____	
14. ____		20. ____	
15. ____		21. ____	
16. ____		22. ____	
17. ____		23. ____	
18. ____		24. ____	

Total ____   **Total** ____

I. Lay the Foundation through Mission and Vision

This action principle examines the extent to which the organization has a core value for its existence which is communicated with and shared by staff and volunteers, and the extent to which there is a vision for how volunteers fit into the attainment of that mission.

Total Score: _____

II. Combine Inspiring Leadership with Effective Management

This action principle examines the extent to which the organization has administrative structures and clear direction which will enable it to encourage and facilitate high impact volunteer involvement.

Total Score: _____

II. Build Understanding and Collaboration

This action principle examines the extent to which staff and volunteers are viewed as valued contributors to the organization and work together as partners in a team effort to accomplish the work of the organization.

Total Score: _____

IV. Learn, Grow, and Change

This action principle examines the extent to which the organization is dynamically examining and attempting to improve its operation, including the continuous effort to broaden its volunteer base to include all segments of the community.

Total Score: _____