

VOLUNTARISM AS AN ORGANIZATIONAL DEVELOPMENT PRIORITY: A CASE STUDY

Eva Schindler-Rainman and Ronald Lippitt
Hilltop Seminars, Los Angeles, California

In many communities, agencies, and organizations, one of the key determinants of productivity and quality of operation is the scope and effectiveness of releasing and utilizing volunteer time and energy. But very few managements have focused on this area of productivity as an O.D. ("Organizational Development") priority.

We are reporting here a case study of a national voluntary organization, the YMCA, which has become involved in the improvement of voluntarism as an intervention for stimulating organizational improvement.

Like many other national, state, and local organizations, the YMCA is concerned about maintaining a basic corps of direct service and policy making volunteers as collaborators with the professional program staff and administration.

Sensitive to the need to improve productivity in this area, the National Board in 1972 adopted a set of national goals which included the goal of "mobilizing and utilizing a far greater number of volunteers",... within five years doubling the number of volunteers active in the YMCA".

Concern about achieving this goal was an important source of readiness to become involved in the activities which are reported below.

We believe the design, and learnings, and methods of this case example are very relevant and applicable to the functioning of many agencies, organizations and communities.

Evolution of concern

There were many ways in which the organization became sensitized to action around its volunteers. These included the following events:

1. The Black and other non-white staff requested that the organization critically look at the number, kind and positions of its non-white volunteers.

2. A national youth-serving inter-agency consultation, suggested by the authors, was initiated by the YMCA. The original consultation of 17 agencies led to an on-going national inter-agency group that continues to meet. Collaboration on the training of volunteers has been one of their concerns.
3. The Research and Development Committee of the National YMCA sponsored the development, publication and dissemination of a new major resource, The Handbook for Training Volunteers. This was a direct outgrowth of a study "Issues of the 70's" which identified the lack of volunteer trainer and recruiter resources.
4. The National Board chairman wrote a letter in which he stated his concern about the high budget appropriations for support of expenses of participation by policy-making volunteers. Concern was also expressed about the amount of staff time spent to support these volunteers as contrasted to the efficiency and lower cost of direct staff service.
The authors of this article responded to this letter with a rationale and plea for expanding, rather than constricting, voluntarism and for real thinking as to how this might be done and the positive consequences for the organization of better utilization of volunteer resources.
5. Increasing concern in the total society about better, more rewarding ways for volunteers to serve also influenced the YMCA. These included statements by volunteers themselves, and by the women's movement and some unions who worried about volunteers replacing paid workers.

Steps taken in light of these concerns

1. The Research and Development Committee held an evening seminar with the national Executive Director and some key board members to focus concerns and plan action.

2. A national retrieval and derivation seminar was decided upon to involve local, regional and national people and experiences.
3. Drs. Clifford Carey¹ and James Hardy² were asked to prepare a paper tracing the role of laymen-volunteers in the YMCA and analyzing volunteer-professional relationship patterns.
4. Drs. Ronald Lippitt and Eva Schindler-Rainman were requested to do a working paper reviewing present-future trends affecting voluntarism and the specific implications of these trends for the YMCA.
5. Dr. Helga Roth³ was willing to review and analyze innovative approaches to volunteer work in light of the future trends -- with specific appropriateness for the YMCA.
6. The R & D Committee got commitment from the above named persons to do the working papers, and a recruitment plan for participants was developed to meet a variety of criteria.
7. The date for the seminar was set: January - 1975, 1:30 to 9:30 p.m. in New York City.

Design of the Seminar

Criteria for the invitation of national, regional, local and outside persons were developed. These included:

- That Regional Directors and their chairpersons come as a team.
- That R & D committee members would act as convenors and resource persons.
- That National Board persons represent men and women, a variety of groups, backgrounds, ages, and local as well as national involvements in the YMCA.
- That National Staff related to the National Board be invited.
- Some key persons outside the YMCA, leaders in the Volunteer World.
- That the group be kept to about 50 persons. All persons were recruited via a personal letter from the staff and the chairperson of the R & D Committee. The timing was designed to coincide with the regular quarterly meeting of the R & D Committee so that the committee could take followup action.

The purposes of the Seminar were:

- to analyze the dynamics of voluntarism in the society - now and future.
- to derive implications for the YMCA from these trends.
- to look at the history of the YMCA to help with the understanding of where the YMCA has been and needs now to go.

Consultants for the seminar were an inside-outside team consisting of Drs. Carey and Hardy from the YMCA and Drs. Lippitt, Roth, and Schindler-Rainman. This team was

responsible for designing all activities related to the seminar before, during and after.

There were three kinds of retrievals before the seminar. A historical paper on voluntarism in the YMCA was sent to all participants one month before the seminar. The present and future trends paper was developed and reproduced for use at the seminar and appropriate innovative volunteer practices were retrieved through the clearing house at NCVA. The design encouraged maximum participation during the day. The flow was as follows:

1. Welcome to participants seated at round tables of 8 persons each.
2. Opening session: Dialogue between national director and seminar consultants on the seminar's origin, purpose and hoped-for outcomes.
3. Highlights of the historical perspectives paper presented by the authors. The seminar group participated with questions, comments and additions.
4. Table group members then discussed, identified, and recorded on large sheets of paper current confrontations in relation to the YMCA as they saw them.
5. Confrontations were posted on the wall, read by everyone, and summarized in writing by one of the consultants.
6. Selected Images of the Future potentially affecting the YMCA were presented by the authors of this article. Copies were made available to each seminar participant. Therefore the authors gave only one image verbally. They asked table groups to each take one of the other 6 images, discuss it and add to the implications of each for the YMCA.
7. During the social and dinner break which followed, the seminar consultants read the implication reports and developed 4 interest groups for after dinner. These were: volunteer training, volunteers in program, inter-agency relationships, and board-staff relationships. Participants picked the group of their first choice. This meant that some topics had more than one work group.
8. Interest groups met and developed specific recommendations for action. One spokesperson for each group reported these out verbally to the larger group and on large sheets.
9. The total group then looked at the recommendations and called out their suggestions of how the recommendations for action should be implemented.
10. The Research and Development Committee met the next morning to begin work on the action recommendations. The ad hoc work was over and use of this work now required effort from an ongoing group in the organization.

The Voluntarism Seminar-Consultation: Content and Process

As a warmup for the seminar, all the participants received ahead of time the historical paper, "Perspective on Lay-Staff Relations and Voluntarism in the YMCA", by Drs. Cliff Carey and James Hardy, retrieving for the seminar the perspective on past policies and practices about staff-volunteer relationships and the utilization of volunteers by the YMCA.

Abstract of Retrieval of the Past

Organization began in London in 1844 and Boston in 1851 as a fellowship of laymen to provide spiritual leadership and needed services to young men in urban areas. There was no paid staff, only elected officers to conduct the affairs of the Association. All were members, and "town meetings" of members made decisions and conducted business.

As size of membership of local associations grew, a division of function and label among volunteers developed. "Laymen" were the members of committees and policy making boards, as contrasted to "members" who were participants in the program of activities. The headquarters of the Confederation of YMCA's, and its records, moved from place to place with the election of new officers.

The opening of rooms with libraries and social facilities required employed staff, called "secretaries", very subordinate to lay leadership.

Then the term "volunteer" emerged to denote unpaid persons providing direct services to "members" under the direction of "staff" guided by "layman" policy makers.

The different terms used to describe staff-lay relationships have been: employer-employee, amateur-professional, volunteer-paid, corporate board and manager, joint partnership.

From 1963 to 1973 the number of consumers of service increased 48% to 8 million men, women, youths and children. During this period the number of policy level laymen volunteers increased 32% to 367,220, while the number of direct service volunteers decreased 1% to 187,034, and the number of paid direct service staff increased 110% to 79,062.

Active lay volunteers have become more heterogeneous, there have been significant increases in the number of women, in racial minority leaders, and in youth under 25.

From this review we can discern 4 trends:

1. Increasing emphasis on more paid workers to provide more varied and more sophisticated services, with relative decrease in unpaid volunteers.
2. Increased emphasis on paid professionals to take on functions of "top management" and to take initiative in relationship to lay Boards of volunteers.
3. Great expansion of programs to serve a wider circle of constituents than young

men -- e.g., families, couples, women, co-ed youth groups, retirees, urban neighborhoods, etc.

4. Recruiting of more heterogeneous groups of volunteers to provide policy-making and program leadership.

The seminar participants reviewed their reading of the paper with Drs. Carey and Hardy, probing with questions of clarification and adding interpretations of historical trends. This discussion moved the seminar ahead to the next diagnostic focus on the here-and-now of voluntarism in the organization.

Current Issues and Confrontations about Voluntarism

Drs. Carey and Hardy started the inventory of issues and problems by identifying 6 current issues of effectively utilizing volunteers:

1. Increasing impact of "big business" managerial models that tend to decrease the depth and breadth of involvement of volunteers in decision-making, planning and evaluation.
2. Increasing demand for technically competent paid staff work on complex problems and for rapid response to changes in the environment -- making involvement of laymen more difficult.
3. Increasing pressure on top lay leaders from the demands of their own occupational roles.
4. Outdated structures for doing work -- traditional agendas of "trivial" work, lack of use of ad hoc task forces, unclear functional relations between Boards, Executive Committees, and professional directors.
5. Less continuity of paid leadership (more cross-agency mobility) so more lay responsibility for continuity.
6. Increased complexity of program methods and quality of service demands increases hesitation and resistance of professionals to recruit and train volunteers.

The discussion of these issues stimulated the remaining participants to identify the following additional current issues/needs:

7. Provide growth-producing opportunities for volunteers.
8. Redefine role of volunteers in the Y -- provide more significant roles for volunteers.
9. Decrease emphasis on fund raising as main volunteer role.
10. Improve training for volunteers.
11. Develop total plan for utilization of volunteers.
12. Increase clarification of staff-volunteer role in decision-making.
13. Be aware of external pressures for program quality accountability.
14. Develop better forms of recognition of volunteers.

15. Develop more staff skill in utilizing volunteers.
16. Clarify that non-Christians can be Y volunteers.
17. Create volunteer talent banks.
18. There is a confrontation between those who really believe in voluntarism and those who push it only for economic reasons.
19. Competition between agencies for volunteers, need to collaborate.
20. Lack of priority given by local leadership to their goal of developing voluntarism.

As the participants shared their diagnoses of issues they also identified several trends of current experimentation to cope with some of these issues. The innovative efforts identified included:

1. Increased use of laymen with professional and technical training as consultants and special helpers.
2. Development of meetings of clusters of Associations where lay leaders can exchange know-how and get insights to strengthen their leadership.
3. Development of new materials for the training of volunteers to provide competent services.
4. Moves toward decentralization of decision-making with more involvement of volunteers.
5. Increased use of short term commitment ad hoc task forces, commissions and subcommittees.
6. Increased use of phone conferences and other communication technologies to involve busy laymen more fully.
7. Small beginnings of inservice training of professionals to work more effectively with and through volunteers.

The seminar was now ready to move from the perplexities of here-and-now problems to the freeing-up mindstretching of looking into the future -- assessing trends and projecting desired "images of potential" for the future of voluntarism in the organization.

Utilizing Images of the Future

Seven major future images affecting voluntarism in a post-industrial society were presented.

They were:

1. Changes in value emphases and life styles: mobility and short term commitments; 2 family breadwinners; active, involved consumers of services; etc.
2. More emphases on humane human services in all people-helping areas: emphasis on development of individual human potential, guaranteed annual income; guaranteed regular health care, human service teams (professional, volunteer, and paraprofessional); etc.

3. Organizations and institutions reorganize to involve staff, volunteers and consumers in decision-making and problem-solving: flatter structures instead in hierarchical; more temporary groups; long range planning; etc.
4. Interdependence and collaboration between organizations, agencies and institutions flourishes at National, State, Regional and local levels: interagency human resources banks; collaborative use of agency buildings and camps; etc.
5. Greater priority is given to quality control and accountability of service delivery: semi-annual reviews of agency services by teams of staff, constituents, volunteers and outsiders; funding bodies require action research on quality of services; etc.
6. More volunteers are available---male, female, all ages, diverse religious, racial and ethnic backgrounds and life styles: new person-to-person recruitment methods; multi-media collaborative portable training; volunteer enabling funds (expense reimbursement).
7. More confrontation of voluntarism by many sectors of society: development of skillful negotiators; union members help make policy re volunteers; more demands by new volunteers to help make decisions; volunteers active in many new places and spaces.

Some of the derived implications of these images for the YMCA were:

1. There will need to be active recruitment of the older citizen and persons from all minority and majority groups.
2. New creative volunteer jobs need to be developed.
3. Renewal training is needed for staff to work with volunteers.
4. Decision making volunteers need to be more varied as to age, race, sex, background and length of experience.
5. Volunteers and staff need to participate in a variety of meetings together including staff meetings.
6. The YMCA needs to develop a Volunteer Human Resources Bank available to all Ys throughout the country (also available to other agencies).
7. Joint staff-volunteer evaluation and research teams need to do much of the needed YMCA research, etc.

Some Priority Ideas for Action

These action recommendations were made by seminar members at the end of the day. They fall into 4 categories.

1. Training
 - That there be developed a team training program for staff-volunteer teams to work as trainers and/or recruiters.

- That an overall new training program be developed for new and experienced staff in relation to working with volunteers.
 - That the professional schools now training youth agency workers be contacted re including work with volunteers in their curricula.
2. Interagency relationships and collaboration
 - That there be a retrieval and dissemination of extant interagency collaboration practices.
 - That information be gathered re funding sources for collaborative activities.
 3. Program
 - That volunteers be much more involved at all levels in program planning and delivery of services.
 - That an appropriate orientation and personal growth training plan be developed specifically for program volunteers.
 4. Boards
 - That a task force be appointed to work on new guidelines for volunteer-staff relationships within the National Board, its related committees and the regional boards.
 - That another task force develop a policy statement on Voluntarism in the YMCA including these elements:
 - The belief in the nurturance of pluralism
 - The nurturance of voluntarism in all YMCA association programs and leadership
 - Relation to funding sources
 - The volunteer and staff resources of the organization

and to disseminate examples of successful board training.

Ensuring Momentum and Continuity of Effort

The seminar-consultation was a limited event of an ad hoc group, convened because of its resources and representativeness of all sectors of the organization. But the seminar was convened by a continuing part of the organization, the Research and Development Committee appointed by the National Board. This unit, and the professional staff related to them, had a commitment to use the seminar, and the findings from it, as the source and legitimization of a continuing intervention effort toward organizational improvement through enhanced voluntarism. The transition from a consultation event to an implementation thrust occurred the day after when the R & D Committee and staff had on their agenda review of the recommendations of the seminar-consultation, development of committee plans and decisions about next steps of implementation, and assignment of responsibilities for action. A review of the success of these steps was put on the agenda for the next meeting, three months later, and a series of interim assignments were accepted to complete the seminar report, confer with the National Director, design a session at the National Board, adopt materials for regional and local workshops, etc.

Summary of Organizational Development Principles for Organizations Utilizing Volunteers

Post Seminar - Translation into Action

There is a multi-thrust plan for action derived from the R & D Committee review of the recommendations. There will be the following foci of efforts, with both staff and volunteers participating at every step.

1. Involvement of National Board.
 - a. A mini experience at the March Board Meeting to briefly go through the seminar process.
 - b. Recommendation that the Board appoint a task force on voluntarism beliefs, policies, guidelines.
2. Preparation and wide dissemination of the Seminar Report.
3. Development and design of materials on voluntarism, to be used at Regional Assembly and cluster meetings.
4. Asking the National Director of Training to make sure that all in-service professional training include a module on working with volunteers.
5. Asking the Training Committee to develop an overall new volunteer training plan

1. The formation and utilization of an inside-outside consultant team lends objectivity, perspective and built-in continuity to such an effort.
2. Multiple entry of an O.D. effort insures that many parts of the system are involved from the beginning and are more likely to continue to stay involved and involve others.
3. Multi-focal diagnosis -- past, present and future, makes all of these sources of data important in developing an action plan.
4. Development of criteria for who should be involved in the process and at what points in time is important for the success of the intervention.
5. Involvement of the relevant decision makers (staff and volunteers) in diagnosis, planning, recommending and implementing the plans spreads "ownership", personal investment and responsibility among the appropriate persons. It also decreases the dependence on consultants and technical experts.

6. Documentation of the process, for purposes of history, retrieval, evaluation and dissemination is crucial.
7. Preparation of materials and of persons participating is always necessary, though the methods for so doing may vary with the intervention.
8. Followup demonstration efforts should have a plan for ripple effects, so that the effort does not stand isolated and unconnected to the organization.
9. If ad hoc or temporary structures are used, it is helpful if they overlap with a continuing structure (e.g., the Seminar with the R & D Committee).

Using This Case Experience in Other Settings

In every community, school system, and in most public and private agencies, increasing the productivity of the involvement and utilization of volunteers is an important goal.

We believe the principles underlying and guiding the efforts reported here are applicable to this variety of situations.

This report, or the more complete report available from the YMCA, might serve as a stimulus to activate such a process in your organization.

The diagnostic review paper about the past might serve as a model for a similar trip into the past of voluntarism in your organization.

The full paper on the future (available in the seminar report) might be used as the basis for an "implications brainstorm" of your staff or board or a special group.

The design of the seminar and its flow of activities might serve as a model for you to adapt to your situation.

You might find some of the resources listed below under References to be helpful for your efforts to increase the quality of voluntarism and through it the strength and vitality of most human enterprises.

Footnotes:

1. Dr. C. Carey is former Director of Research, National Council of YMCA, now volunteer member of R & D Committee.
2. Dr. J. Hardy is Director of Organization-Development, National Council of YMCA.
3. Dr. H. Roth is director of the Clearinghouse of the National Center for Voluntary Action.

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Vickery, Florence

"Creative Programming for Older Adults: A Leadership Guide", YMCA.

Voluntary Action Center Clearinghouse and Newsletter

(Dr. Helga Roth, NCVA, 1785 Mass. Ave. N.W., Washington, D.C. 20036)

YMCA (these items may be ordered from the YMCA, 291 Broadway, New York, N. Y., 10007)

#3106 Perspectives for Social Relevance in Long Range Planning.

#3151 YMCA Boards and Committees of Management in 1973.

#3152 Today's Changing YMCA Boards and Committees.

#3150 Training Volunteer Leaders, 1974.

Training Series:

#3502 Development of the Human Resources of the Organization.

#3504 Assessing Training Needs.

#3503 Conditions for Learning.

#3505 Designing Training.

#3506 Sensitivity Training.

#3106 Perspectives for Social Relevance in Long Range Planning.