

ABSTRACT

Using the Hobson et al. (1996) model of nonprofit "volunteer-friendliness" as a conceptual framework, telephone survey information was collected from 500 midwestern United Way affiliated agencies. Callers expressed interest in performing volunteer work and evaluated the "volunteer-friendliness" of staff responses, using dimensions derived from the literature on telephone customer service quality. Results revealed six prominent strengths in the sample, including answering calls within three rings (93 percent). Several specific areas for improvement were pinpointed, including failure to invite callers to visit the agency (84 percent) and failure to ask callers about their time availability (77 percent) or skills (70 percent). The study provides agency administrators with a useful tool for defining and measuring service quality during initial telephone interaction between prospective volunteers and staff members. Finally, the findings offer normative data on organizational effectiveness that can be very helpful in comparatively assessing agency performance in this important area of "volunteer-friendliness."

Initial Telephone Contact of Prospective Volunteers with Nonprofits: An Operational Definition of Quality and Norms For 500 Agencies

Charles J. Hobson & Kathryn L. Malec

Introduction

Volunteers are the "lifeblood" of most nonprofit organizations. In addition to serving as board members, volunteers often play critical roles in providing direct services to clients and performing administrative functions. Also, volunteers are more likely than nonvolunteers to make financial donations.

During the 1990s, several authors have observed disturbing trends in volunteerism in the United States that pose significant challenges to all nonprofits (Ellis, 1995; Hammonds & Jones, 1994; Hayghe, 1991; Independent Sector, 1995; Martin, 1993). First, the total number of volun-

teers has exhibited a general trend downwards. Second, the number of hours that volunteers have to give has been declining, due to several demographic, economic, and work-related factors. Third, competition among nonprofits for the dwindling pool of volunteers has been increasing.

Volunteer-Friendliness

In order to assist nonprofits in meeting these challenges, Hobson, Rominger, Malec, Hobson, and Evans (1996) developed a model of agency "volunteer-friendliness." This new concept was defined as the extent to which a nonprof-

Dr. Kathryn L. Malec is an active researcher on volunteerism, having published and presented several papers in the field and co-developed the Volunteer-Friendly Index for nonprofits. She has taught a number of college courses on volunteerism and provided related workshops to the American Lung Association of Indiana, the National Association of Meal Programs, the Drifting Dunes Girl Scout Council, Merrillville, Indiana, and the Lake Area United Way. Dr. Malec has also volunteered with the Oak Park Township (Illinois) Senior Advisory Council; Caritas Adult Day Care, Crown Point, Indiana; the American Lung Association of Indiana; and the Drifting Dunes Girl Scout Council.

Dr. Charles J. Hobson has an active research program on volunteerism, has published and presented papers in the field, and is co-developer of the Volunteer-Friendly Index for nonprofits. He requires students in his graduate and undergraduate business classes to complete volunteer projects with local agencies. Dr. Hobson has been a volunteer board member for the Visiting Nurse Association and the Lake Area United Way, as well as board member and President of the Northwest Indiana Wellness Council. He provides direct client service to medically challenged infants and toddlers at the Nazareth Home in East Chicago, Indiana.

it's staff, policies, and programs provide a positive, pleasant, and rewarding experience for volunteers and prospective volunteers.

The Hobson et al. model consists of four components: (a) volunteer attraction and recruitment, (b) initial personal interaction with agency staff, (c) volunteer utilization and assignment, and (d) post-volunteering follow-up. It posits that volunteer-friendly agencies will realize a number of important specific benefits including; more volunteers, more volunteer hours, higher volunteer retention, and increased volunteer financial contributions.

Within the volunteer-friendly model, the quality of a prospective volunteer's initial interaction with agency staff is viewed as a critical first step in forming a mutually beneficial long-term relationship. This initial agency contact commonly takes place on the telephone and serves as the focus of this paper.

Initial Telephone Interaction

Business organizations have long recognized the importance of positive telephone interaction with customers and prospective customers. Research by for-profit corporations has found that the effective use of the telephone is a vital component in any marketing strategy (Hitt and Wulff, 1992; McQueen, 1991; Pardu, 1990; Marsh, 1988; Witwer, 1988) McQueen found that seven out of ten customers refuse to do repeat business with a firm based upon how they were treated during their first encounter, typically on the telephone. According to a survey conducted by Marchetti (1995), 85 percent of the 500 consumers questioned indicated that telephone courtesy is a critical factor in their decision to purchase goods and services. Jarvis (1994) found that callers form lasting opinions of a company within the first six seconds of a telephone conversation or voice-mail encounter. In addition, rudeness was viewed as the number-one telephone offense, followed by leaving customers on hold, transfer-

ring a call to the wrong department, failing to pick up until at least five rings, answering without proper identification, and screening calls.

A growing practitioner-based literature has emerged that provides advice about how to best conduct initial telephone interaction with customers (Dee, 1998; Finch, 1990; Flatt and Williams, 1995; Friedman, 1995; Hitt & Wulff, 1992; Humphries, 1995; Marsh, 1988; Witwer, 1988). Specific recommendations include the following: (a) try to answer the phone within three to four rings, (b) minimize use of automated phone menus and provide callers with the option of speaking with a person, (c) provide callers with a greeting, the name of the organization, the name of the person answering the phone, and an offer of assistance, (d) address callers by their name, (e) when transferring calls, give the name and extension of the person to whom the call is being referred, (f) minimize the practice of putting callers on hold and always ask their permission first, (g) when a caller is placed on extended hold, try to return to them within 30 seconds and thereafter every minute, (h) properly take phone messages and promptly return calls, (i) end conversations by thanking the caller for their interest in your business.

Research Purpose

Although the importance of initial telephone contact has been recognized in the business literature and the Hobson et al. volunteer-friendly model, this issue has not yet been systemically addressed in the nonprofit sector. The overall purpose of this study was to begin the process of investigating the role of telephone communication in attracting/recruiting volunteers for nonprofit organizations. More specifically, there were two primary objectives. The first one was to develop an assessment tool to operationally define and measure the quality of initial telephone contact between prospective volunteers and nonprofit agencies. The second major objective was to establish

empirically-based performance norms for nonprofits concerning initial telephone contact with prospective volunteers.

Methodology

Nonprofit Sample

A total of 500 United Way affiliated organizations were randomly selected from a published nonprofit directory for a major midwestern metropolitan area. In addition to a brief description of each agency, the directory provided telephone numbers to call for more information. These numbers were used to initiate contact with each of the 500 nonprofits.

Initial Telephone Contact Evaluation Tool
The evaluation tool to assess initial telephone contact was developed using information from two primary sources. First, the private sector literature discussed earlier on recommended telephone etiquette was reviewed to identify key quality indicators. Second, local and national United Way guidelines for member agencies concerning initial telephone contact with prospective volunteers were also considered.

FIGURE I

Key Quality Indicators in Initial Telephone Contact with Prospective Volunteers

1. Answer phone within three rings.
 2. Provide a greeting.
 3. Provide the name of the agency .
 4. Offer assistance to the caller.
 5. Provide the name of the person answering the call.
 6. Use the caller's name in the conversation.
 7. Ask for the caller's full name and telephone number for call-back purposes.
 8. If an agency call-back is needed, be sure to follow through and place the call.
 9. Do not ask a prospective volunteer to call the agency back.
 10. Extend an invitation to visit the agency.
 11. Inquire about the caller's skills.
 12. Ask the caller about the number of hours available to give.
 13. Ask the caller if references can be arranged.
 14. If the caller's skills are incompatible with the agency's needs, refer them to another nonprofit.
 15. Thank the person for calling.
-

A 13-person ad hoc committee consisting of nonprofit agency executive directors, United Way professional staff, United Way volunteer board members, and university researchers met to review the above information and formulate an operational definition of high quality telephone service. As a result of these deliberations, the committee produced a set of 15 critical quality indicators (see Figure 1). These indicators served as the basis for the evaluation tool used in this study to assess initial telephone contact quality. The specific questions used are provided in Table I, in the Results section.

Telephone Script for Prospective Volunteer

The telephone script for prospective volunteer callers involved the following scenario: greeting the agency staff member who answered the phone, providing a full name, and inquiring about potential volunteer opportunities with the agency. Callers reported that they were relatively new to the area, had done volunteer work in the past, and were actively investigating and evaluating available volunteer options. If asked, the caller also provided a return telephone number, complete with an appropriate answering machine (this was used to monitor if promised return calls were made and how long it actually took to receive the call-back).

Callers were trained to respond to questions from agency staff members in a general and non-committal manner. They maintained their focus on a comparative assessment of a variety of volunteer options.

Caller Selection and Training

Students in a senior level business class were recruited to make telephone calls for this project and paid on an hourly basis. They were thoroughly trained and tested on using the volunteer script and completing the evaluation form.

Data Collection and Analysis

Data was collected during an 8-week period of time. Calls were equally dis-

TABLE I
Summary of Statistical Results
VOLUNTEER-FRIENDLY TELEPHONE SURVEY
(500 United Way Agencies)¹

	Frequencies and Percentages	
	Yes	No
1. Was your call answered?	482 (96.4%)	18 (3.6%)
1a. Number of rings before phone was answered? Mean = 2.0 rings 93% Standard Deviation=3.1 rings		
2. Was your call answered by a person or automated system? Person=425 (88.5%) System=55 (11.5%)		
3. Were you greeted (Good Morning, Good Afternoon, etc.)?	268 (56.8%)	204 (43.2%)
4. Was the agency name incorporated into the greeting?	458 (96.6%)	16 (3.4%)
5. Were you offered assistance? (May I help?)	232 (49.3%)	239 (50.7%)
6. Were you put on hold?	243 (52.5%)	220 (47.5%)
6a. If yes, length of time on hold? Mean = 29 seconds Standard Deviation = 27 seconds		
7. Were you transferred?	173 (37.2%)	292 (62.8%)
7a. If yes, were you directed to correct contact?	120 (73.6%)	43 (26.4%)
8. Were you given the name of the person you talked to?	141 (30.7%)	318 (69.3%)
9. Were you addressed by your name in the conversation?	91 (19.9%)	367 (80.1%)
10. Were your name and phone number taken down?	236 (51.3%)	224 (48.7%)
11. Were you asked to call the agency back later?	90 (19.6%)	370 (80.4%)
12. Were you offered a call-back from the agency?	181 (39.4%)	278 (60.6%)
12a. If yes, did you receive a call-back from the agency?	54 (30.0%)	127 (70.0%)
12b. How many hours after your initial call did you receive the call-back? Mean = 17.0 hours (less than 1 day) Standard Deviation = 35.6 hours		
13. Were you invited to come see the agency?	75 (16.3%)	385 (83.7%)
14. Were you asked about the skills you have?	109 (23.7%)	351 (76.3%)
15. Were you asked how many hours you can give?	104 (22.6%)	356 (77.4%)
16. Were you asked for references?	12 (2.6%)	446 (97.4%)
17. If your skills were not compatible with the agency, were you referred to another agency?	40 (15.3%)	221 (84.7%)
18. Were you thanked for calling?	386 (83.9%)	74 (16.1%)

¹In some cases the total number of responses for a particular item is less than 500, due to missing data.

tributed over the five work days, as well as between mornings (8:00 to 12:00) and afternoons (1:00 - 5:00). An answering machine was used to record whether promised agency call-backs were made and how long it took to receive them. Completed caller evaluation forms were coded and computer analyzed. Basic descriptive statistics, consisting of simple frequencies and percentages, were computed for each item. In three instances,

means and standard deviations were also calculated.

Results

Statistical results are summarized in Table I. For each item with a "Yes-No" response format, the frequencies of "yes's" and "no's" are provided, along with associated relative percentages. In some cases, the total number of responses is less than 500, due to the unavailability

of complete data. For three of the evaluative items (1a, 6a, and 12b), means and standard deviations are reported.

The results in Table 1 are best viewed as an initial attempt to establish descriptive norms for nonprofit volunteer friendliness on the telephone. The statistics for each evaluative item provide an indication of how well agencies are currently performing in that area.

A review of the results in Table 1 reveals the following prominent strengths or areas of excellence: (a) the overwhelming majority of telephone calls to agencies were in fact answered (96.4%), (b) the average number of rings before calls were answered was very low — 2.0, indicating excellent responsiveness, while 93% of the calls were answered within three rings, (c) the majority of calls were answered by agency staff members (88.5%), thus insuring that the initial contact was personal — this could also be attributed to a lack of funding for more “sophisticated” automated phone systems, (d) the name of the agency being called was consistently provided by staff members (96.6%), (e) for those callers who were put on hold (243), the average length of time was only 29 seconds, again indicating good responsiveness to telephone inquiries, (f) a majority (83.9%) of the prospective volunteers were thanked for calling — indicating recognition of their interest and intended generosity.

Significant areas for improvement include: (a) agency staffers provided a greeting to callers in only 56.8% of the cases, (b) also unexpected, agency staffers provided an offer of assistance (“May I help you?”) in only 49.3% of all cases — perhaps a heavy workload, coupled with staffing shortages, can account for these findings, (c) for those callers who were transferred (163), a significant percentage (26.4%) were not directed to the appropriate person, (d) in most instances, agency staff members did not provide the callers with their names (69.3%), (e) a majority (80.1%) of agency staff members did not use the caller’s name in their conversation

(recall that the script used in this study required the caller to provide his/her name at the beginning of the conversation), (f) agency staff members failed to request the caller’s name and phone number in fully 48.7% of all cases (g) when the appropriate contact person was not available, agency staffers requested that the prospective volunteer call back at another time in nearly one out of five cases (19.6%), (h) when agency staff members offered to call back the prospective volunteer (181), an actual call was received in only 30.0% of all cases — on the positive side, these call-backs were made, on average, in less than a day (17.0 hours), (i) callers were not generally invited to visit the agency (83.7%), (j) in most instances, callers were not asked about their (a) skills — 76.3%, time availability — 77.4%, or references — 97.4%, (k) when the caller’s skills and/or availability were not compatible with agency needs, in most instances (84.7%), they were not referred to another, potentially more appropriate agency, (l) finally, in 16.1% of the calls, prospective volunteers were not thanked for contacting the agency.

Discussion

Conclusions

The results of this study indicate that it is possible to measure the quality of initial telephone interaction between prospective volunteers and nonprofit agencies. Development of the assessment tool also represents an initial attempt to operationally define and empirically test major components in the Hobson *et al.* model of nonprofit volunteer-friendliness.

The instrument that was formulated incorporated research results and recommendations from the private sector, along with general policies of the Lake Area United Way and its member agencies. As such, the tool embodies a comprehensive definition of telephone interaction quality, as applied to nonprofits.

This study also produced the first set of norms describing initial telephone interaction between prospective volunteers

and nonprofit agencies. The large sample size of 500 allows one to confidently interpret the calculated statistics as reliable indicators of telephone interaction quality. As mentioned in the Results section, nonprofits as a group excelled in a number of specific areas. Conversely, there were several areas where considerable improvement was needed.

Practical Applications

The measurement tool and results of this study can be used by nonprofit managers to assess how well their agency is handling initial telephone inquiries from prospective volunteers. Evaluation findings for an individual agency can be compared to the norms developed for the entire sample of 500. In this manner, the relative strengths and weaknesses for a particular agency can be pinpointed.

Based upon an initial assessment of telephone interaction quality, nonprofit managers and their staffs can develop and implement improvement strategies. Performance could then be periodically reassessed to monitor progress over time. Thus, the measurement instrument provides nonprofit managers with an objective diagnostic tool to assess the volunteer friendliness of their agencies and a basis for implementing improvement programs. Such efforts should assist nonprofits in: (1) attracting and retaining the volunteers needed to insure organizational success and (2) demonstrating to potential donors and funding agencies that concerted efforts are being made to fully utilize volunteers.

Future Research

Results of this study suggest a number of directions for future research. First, studies are needed to document the relationship between agency volunteer-friendliness on the telephone and important outcome variables, such as the percentage of callers who actually volunteer. Private sector findings strongly suggest that relationships do exist.

Second, it would be interesting to

investigate the organizational characteristics associated with high levels of quality in telephone interaction with prospective volunteers. In other words, what organizational mission, policy, program and procedure factors are related to success. Third, empirical research is needed to comparatively evaluate different training and development strategies to improve telephone volunteer friendliness. Fourth, continued research and testing with the Hobson *et al.* volunteer-friendly model will improve understanding of the volunteering process and assist nonprofits in maximizing their efforts in this crucial area.

REFERENCES

- Anderson, K. & Zemke, R. (1991). *Delivering knock your socks off service*. New York: American Management Association.
- Dee, D. (1998). *Phone me, fax me, beep me! Teleconnecting your way to success in the new cyberspaced workplace*. Chicago: Dartnell Corporation.
- Ellis, S. J. (1995). How you can benefit from the latest volunteer trends. *Non-profit World*, 13 (5), 53 - 56.
- Finch, L. (1990). *Telephone courtesy and customer service* (2nd ed.). Los Altos, CA: Crisp Publications.
- Flatt, C. & Williams, L.K. (1995). Business etiquette: A competitive edge. *The CPA Journal*, 65 (7), 12.
- Friedman, N.J. (1995). *Telephone skills from A to Z: The telephone "doctor" phone book*. Menlo Park, CA: Crisp Publications, Inc.
- Hammonds, K.H. & Jones, S. (1994, April 4). Good help is really hard to find. *Business Week*, 100-101.
- Hayghe, H.V. (1991, February). Volunteers in the U.S.: who donates the time? *Monthly Labor Review*, 114, 17-23.
- Hitt, A.W. & Wulff, K. (1992). *Positive impressions: Effective telephone skills*. St. Louis: AIM Press.
- Hobson, C.J., Rominger, A., Malec, K.L., Hobson, C., and Evans, K. (1996). Volunteer-friendliness of nonprofit agen-

- cies: Definition, conceptual model, and applications. *Journal of Nonprofit & Public Sector Marketing*, 4 (4).
- Humphries, A.C. (1995). The right moves. *B&E Review*, 41 (4), 11-15.
- Independent Sector. (1995). *Facts and figures on the Independent Sector*. Washington, D.C.: Independent Sector.
- Jarvis, C. (1994). Prescribing good manners. *Nation's Business*, 82 (5), 18.
- Marchetti, M. (1995). Dial 'R' for rudeness. *Sales and Marketing Development*, 147 (12), 33.
- Marsh, W. (1988, December). The terror of the telephone. *Australian Accountant*, 58, 24-29.
- Martin, D. (1993). The top 10 trends in philanthropy. *Fundraising Management*, 24 (6), 40-41.
- McQueen, I. (1991, September). First impressions phone impressions. *Office Systems*, 8, 26.
- Pardu, B. (1990, March/April). Hold the line. *Canadian Banker*, 97, 42-44.
- Witwer, B. (1988, January/February). Thank you for calling. *Management World*, 17, 8-9.