

# KEEPING TRACK

## Several good reasons why you should go on record

By Patricia Chapel

*Professionals lament the fact that volunteering is universally underestimated, without realizing that it may be our own fault! Our failure to communi-*

### **An introduction by Harriet Naylor**

*cate who volunteers, and what is done by volunteers, makes our own work harder. Old myths and stereotypes inhibit recruiting and staff acceptance of volunteers, and we lack facts to prove what is happening, or to prove the extent of our own services, let alone to form a basis for future planning.*

*Record keeping is the weakest function of most volunteer offices. Some of us feel that "numbers" are "dehumanizing," but numbers in the aggregate are very impressive, even to humanists. If the trends shown in the 1965 and 1974 Census Bureau studies (Americans Volunteer) have continued, projections show half the United States population affected by at least one volunteer, and probably many more. We don't need complex chi squares, we just need the kind of responsible fact recording and review system that Pat Chapel has worked out.*

*Most of us would be pleasantly surprised to find out how much has been done, and how much easier coordination and planning will be when we know who has done what, and when. If volunteers need documentation of their experience, there it is. If fund givers need to know what the cost and values are, we will have a sound basis for claims on their respect and support. Most of all, we will really know what has been done for whom, instead*

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*of depending on someone to remember to thank us. The public gives time, effort and skill. The least we can do is keep track of the way it is used!*

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**I** WAS ONCE A NOTORIOUS RESISTER to record keeping. I was able to dismiss that activity in dozens of ways. I would say, the only reason they want records is to justify their jobs ... and, if we spent half the time it takes to do record keeping on delivering service, we could double our output ... or, people aren't numbers, they're individually unique, let's deal with *them*.

Then, in 1973, the county received start-up monies from ACTION for a Voluntary Action Center, and I was named executive director. I knew our nonrenewable grant would be evaluated; VACs were new at the time. But no one said what measures would be used.

When an organization has just one year to become an institution, one tries to please everyone. I felt a special need to please our two diverse funding fathers—the county board and the United Way. I knew it was essential for agencies to be pleased with our referrals. Of course I wanted our board to be pleased. So, my opinion of the numbers game modified 180 degrees. We began to keep all sorts of records to show what the job was and how we were

doing it. I'm pleased to report that the strategy worked.

### **Know thy customer.**

In the spring of the following year, I read Peter Drucker's *Management: Tasks, Responsibilities, Practices*. I was impressed with his "know-your-customer" marketing approach. Until then we had been acting as if our customer were the county board, the United Way, and the 60 or 70 agencies we worked with. We had to admit that we never really had identified our customer.

From that time on, in our speech and behavior, we identified our client as the citizen who is looking for satisfying and meaningful volunteer work. We are the agent for the volunteer applicant. Our bottom line is measured in customer satisfaction (good placement). We enjoy seeing the shocked expressions of agency staff when we say we're not in business to help them. But we quickly soften that by adding that when the volunteer's needs are being met, agency and client needs will be served better. With that explanation, no one objects. In fact, they are even more enthusiastic about our referrals.

### **A volunteer profile tells us we must ...**

Once our role and purpose were clearly defined, it became absolutely essential for us to know more about our customers—who they were, what they were like, where they lived and what they did with their time. With one year's data we were able to compile a volunteer profile. It's full of implications and indications:

- Sixty-eight percent of all our customers, for example, are between the ages of 19 and 35. We do not have many volunteers from the over-50 group. We're satisfied to have RSVP (Retired Senior Volunteer Program) deal with the majority of that potential. Our ready market is with the fairly well educated. This is consistent with the findings of the 1974 ACTION survey, *Americans Volunteer*. Knowing and sharing this information with the local newspaper editor, we can have our column of volunteer opportunities near the editorials and letters to the editor. That's where the activists do their reading.

- Two-thirds of the people who call us are busy during the day (44 percent employed, 21 percent student). This indicates to us that we need to work hard



that registrations would close three days before the scheduled training. On the day to close registrations, we had only 26 enrollees. Since we had recruited some rather prestigious local folks (a professor of advertising, editor of the newspaper, and a TV public service director), we seriously considered cancelling the event. But we resisted the easy way out. In the two days following the deadline, 48 more people rushed in with forms and checks.

Every training event we've sponsored since then has revealed this definite pattern. About one-third of the participants will register during the first week after the announcement is made. Two-thirds will wait until the last week to commit themselves. As a result, we've made an adjustment; we now close registrations just one day before the event. Because we keep these records, we know enough to anticipate a large late registration, and spend our time in preparation instead of worry.

We keep a notebook for our daily record of phone calls, visits to the office, and business out of the office. We log a short description of each activity. Our log is probably the most useful resource we maintain. A staff member or volunteer can be out of the office for any period of time, and upon return can review the log and not miss a thing. We can review a particular week or month, and retrieve the information of the various activities in an objective way. We know the majority of volunteers call the first three days of the week. We get more calls for information on Mondays and Fridays.

Everything we do should be done with evaluation in mind. It forces us to look at our program and goals. You cannot do that without records.

Yes, now I am an enthusiastic record keeper. Having all this information and trying to use it in meaningful ways is a daily challenge. One of the things I've learned is that it is the job of the chief administrator to be the historian of an agency or program. The chief needs to know what has happened in the past and what is happening now, in order to make sound decisions for the future.

I like putting on my diagnostician's cap and trying to be the problem solver. And how I enjoy watching the unbelieving stares and the pained expressions on people's faces when they ask what I like about my job and I say, "Record keeping."