

# 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

to develop evening and weekend opportunities for these people. No wonder the traditional agency that closes at 5:00 p.m. is hard-put to fill its volunteer needs.

- Seventeen percent—or 86 people—are volunteers whose formal education stopped at high school. We can assume that most of them are hourly wage earners, so we know where to begin looking for them. We can design special appeals geared to their concerns.

- Our records show that the number of employed people volunteering is increasing, but the number of males is not increasing. That tells us we must do more to liberate the men-folk and let them in on the benefits of volunteering. Ironically, the "most satisfied" volunteer turned out to be male, 26 to 35, some college, with no previous experience.

Our chief statistic gatherer constructed this profile of those who seemed most satisfied with their placements by measuring the extra-positive comments made by the volunteers during our follow-up process. Their comments are routinely recorded on the volunteer card. We were surprised and puzzled with the results. But after a few hours of looking at the data, we decided it was probably because these men did not have any previous volunteer experience.

**Records can be handy training tools.**

I use this volunteer profile when I do workshops with any of these titles—"Planning and Evaluation," "Goal Set-

ting," and my favorite, "Convincing the Critics." Each participant receives a copy of the statistics. I ask them to pretend they are a member of the VAC board of directors. Their task is to develop a set of goals for the coming year. I instruct them in the technique that Marlene Wilson describes in her book, *The Effective Management of Volunteer Programs*. They must test their goals to see if they are specific, measurable, achievable and compatible.

What kind of goals should this "pretend" board consider? Perhaps they might want to increase the number of high-school educated volunteers. Or they might want to increase the number of male applicants, or to recruit more people from the category of never having had any volunteer experience. The important thing is that the goal setters have real information they need to set a goal.

**Records can determine achievable goals.**

During 1977, we interviewed 439 individuals and in 1978, we interviewed 416. One year ago, our board set the following goal: Interview 500 individual volunteers and maintain the 65 percent placement rate. To help achieve this nearly 20 percent increase, VAC staff and board manned recruiting stations in shopping malls and at the University of Illinois on six occasions during the year. It worked . . . sort of.

We interviewed 504 individuals, but our placement rate fell to 60 percent. We looked closely at the people

recruited on these special days, and found that their placement rate was significantly lower than our average. We judged that these recruits and visitors at the outposts acted impulsively. Next year, we will set up displays in 12 locations, but with no attending personnel. We hope a potential volunteer will receive new information and be motivated to call us and apply in the usual way. The telephone call apparently is an important screening process. One of our goals for 1980 is to reach the 65 percent placement rate.

**We the staff can plan by the record.**

Record keeping is good for us staff people, too. It allows us to have monthly checks for ourselves. We care how well we're doing. If numbers begin to slip, we can try something new or something different. It's not uncommon for someone to ask how much activity to expect in September. Since we have six years of records, we can tell you that the average number of volunteer applicants during September is 51. We plan our other functions, like training, during slow recruiting months.

There are other records most offices keep that contain useful information. Minutes will show attendance at meetings and levels of participation. Registration cards from training events will yield certain information.

Several years ago we offered a public relations workshop for nonprofit organizations. Announcements were sent a month in advance and notice was given

VOLUNTEER ACTIVITY							MAY	1979	
							(MONTH)	(YEAR)	
DAY	TOWN	W/S	M/F	AGE	ED.	EXP.	VOLUNTEER	REFERRAL/OUTCOME	HRS/NO
5/1	CHAMPAIGN	WORKS	FEMALE	19-25	SOME COL	YES	CHRIS MEYER 356-5907	TELECARE	12
5/1	URBANA	STUDENT	FEM	19-25	H.S.	NO	MARY BARRY 367-6108	COMMUNITY OUTREACH	
5/1	CHAMPAIGN	WORK	MALE	26-35	SOME COL	NO	MARK STELLER 352-0073	PROBATION DEPT	
5/2	RANTDLE	WORKS	FEM	19-25	COLL GRAD	YES	NANCY BURTELL 892-3404	RED CROSS	
5/3	CHAMPAIGN	NEITHER	MALE	31	COLL	YES	ROBT DICKEY 356-2121	HUMANITIES COUNCIL	

# ZBB\* and the Voluntary Sector

## (\*Zero-Base Budgeting)

By Wm. Harvey Wise

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."

**Z**ERO-BASE BUDGETING, MADE popular by the Carter Administration, has become one of the most fashionable buzz words in management jargon. ZBB is frequently at the top of the agenda at many management symposiums, and scores of articles and books on the subject have been published by a variety of public and private organizations which have used zero-base budgeting with success.

One sector of our pluralistic society, however, has been conspicuously mute in the uproar over ZBB, and that is our very own voluntary sector. This seems odd since we are in a period in which our financial resources are shrinking—at best stabilizing—and inflationary costs are spiraling. Efficient management never has been more crucial to the voluntary nonprofit organization.

Two years ago, JACS—Joint Action in Community Service, Inc.—decided to give zero-base budgeting a try in an attempt to tighten our financial management and to improve fiscal planning. JACS is a national, nonprofit volunteer organization mainly funded by the U.S. Department of Labor to provide hometown support services to returning Job Corps trainees, aged 16 to 21. More than 6,000 JACS volunteers offer these youngsters assistance with employment, housing, transportation, and a myriad of other problems which may arise during the difficult transition from training to employment. Last year, JACS volunteers helped over 20,000 trainees.

JACS is administered by a paid staff of 34, located in 10 regional offices scattered throughout the country and a national office in Washington, D.C. The staff is extremely program oriented and

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dedicated, but many have little expertise in planning or fiscal management. Both factors—our decentralized operation and a staff unaccustomed to financial analysis—would present additional problems in implementing ZBB techniques, but were primary reasons why we needed a more efficient system and why we decided to start from scratch—or *base zero*—to develop one.

After some adjustment problems by a staff wedded to "old school" budget and planning techniques, ZBB has proven to be a valuable tool in identifying and evaluating many aspects of our operation. It has been particularly valuable in allowing us to justify every level of expenditure, both current and future, to our funding sources.

**Z**ERO-BASE BUDGETING" IS A somewhat misleading term, in that it is a systematic method of addressing *planning* as well as *budgeting* targets. ZBB identifies the input required for budgeting, while at the same time identifies the output desired through planning. As Peter Pyhrr, author of *Zero-Base Budgeting*, puts it, ZBB is a tool to "efficiently identify and evaluate activities and their related problems so that management can make decisions, take action to solve those problems, and effectively allocate and utilize the organization's resources."

The key to zero-base budgeting is the *decision package*, which, Pyhrr says, "identifies a discrete activity, function or operation in a definitive manner for management evaluation and comparison with other activities." Once a specific activity or function is identified in such a manner then "management can (a) evaluate it and rank it against other activities competing for the same or similar limited resources, and (b) decide