

# How using proven management techniques creates rewarding relationships with your volunteers

BY PAUL LAGASSE

This should come as no surprise. As nonprofits continue to tighten their belts, the idea of using volunteers to accomplish more with less is increasingly more appealing. After all, people might not have as much money to give, but they may be more willing to offer their time and expertise. Yet how do you find the right volunteers for your organization? Then, once you find them, what do you do with them, how do you work with them and how do you keep them engaged?

The good news is that there is no shortage of people willing to volunteer. The latest statistics from the Corporation for National and Community Service (CNCS), an independent federal agency in Washington, D.C., that runs Senior Corps, AmeriCorps, and Learn and Serve America, demonstrate just how deep the volunteer pool that nonprofits can draw from really is. A July 2008 state-by-state survey of volunteers, *Volunteering in America: 2008 State and City Trends and Rankings*, reported that 26.2 percent of adults—slightly less than 61 million people—contributed more than 8 billion hours of volunteer service in 2007, worth an estimated \$158 billion. Furthermore, between 2002 and 2007, the number of volunteers grew by more than 1 million. A 2006 CNCS report, *Volun-*

*teer Growth in America: A Review of Trends Since 1974*, also found that the numbers of people volunteering are the highest they have been in 30 years, with rates of volunteerism among teenagers alone rising by more than 200 percent from 1989 to 2005.

Nevertheless, many nonprofits are not taking advantage of volunteers and all they have to offer. According to David Eisner, former CEO of CNCS, more than one-third of the people who volunteered in 2006—nearly 22 million—did not volunteer again in 2007. Explained another way, CNCS estimates that the value of this lost volunteer time amounted to approximately \$38 billion. What explains the decline? The most common reasons, according to the article “The New Volunteer Workforce” (*Stanford Social Innovation Review*, Winter 2009), written by Eisner and three others also from CNCS (Robert T. Grimm Jr., Shannon Maynard and Susannah Washburn), include:

- Failing to provide strong leadership
- Not matching volunteers’ skills with the duties assigned to them
- Failing to train and invest in volunteers and staff
- Not measuring the value of volunteers’ contributions
- Failing to recognize volunteers’ contributions

To avoid making these mistakes, many experts on volunteerism recommend approaching volunteer management the same way you would proceed in any meaningful relationship. There are some essential similarities with volunteer recruitment and management: organizations court volunteers who hopefully respond with a formal commitment. Then, over time, as volunteers and organizations grow more familiar and comfortable with each other, they help each other to grow and succeed. By developing good volunteer management strategies for each of these phases, you will ensure that your organization and your volunteers develop and maintain harmonious—and productive—relationships and a solid foundation for the future.

## Be Prepared

Before you begin searching for a volunteer, you need an idea of the kind of person you are hoping to find. Is experience or enthusiasm more important? Do you need someone with technical savvy or the ability to do heavy lifting? Perhaps you are looking for someone with connections? Linda Lysakowski, ACFRE, president and CEO of the fundraising consulting firm Capital Venture ([www.cvfundraising.com](http://www.cvfundraising.com)) in Las Vegas, Nev., recommends creating



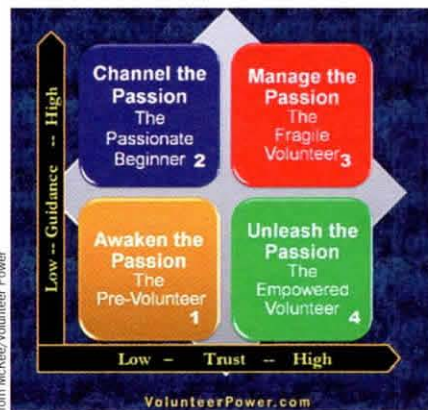
## Volunteer Management

job descriptions for volunteer duties, just as you would for staff positions, and then communicating those expectations to potential volunteers.

Lysakowski recalls the time when, as a museum development officer, she approached a CEO about serving on her organization's corporate appeals board. The CEO had just arrived in town and had already been approached by other organizations—all of which he had declined to support. However, Lysakowski came armed with a recruitment packet that included a case for support, a job description, a list of other business leaders serving on the project and a timeline. Within 40 minutes, the CEO agreed to serve on her museum's corporate appeals committee.

"I've been in town for two weeks and about a dozen other development officers have come to ask me to give money or serve on their boards," the CEO told her, "but you're the first one who's been really well prepared."

"For some reason, when it comes to volunteers, people usually use the exact opposite approach," observes Lysakowski, who has authored or co-authored six books, including *Recruiting and Training Fundraising Volunteers* (Wiley, 2005). "They look around and say, 'Oh, he's a nice guy (or



**Tom McKee of Volunteer Power proposes a four-stage volunteer management strategy based on appropriate levels of trust and guidance as volunteers gradually gain experience.**

he has lots of money or is a big name), let's get him on the board.' Then the fellow shows up at a meeting, they tell him what the expectations are and he realizes that he didn't know any of that going into it."

Assuming the volunteer does not quit outright, Lysakowski points out, it is unlikely that the new person will take on many duties or assume much responsibility.

"You need to be honest with volunteers up front and tell them how much time is required so that none of this comes as a surprise later in the process," she urges. "A person who volunteers for an organization has a reason

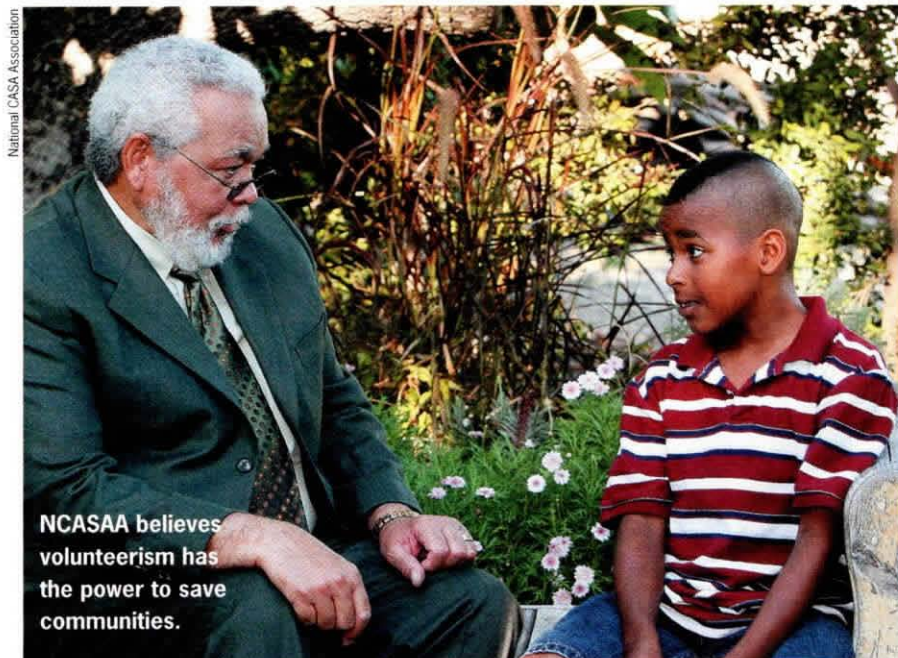


**Future Farmers of America members and adult volunteers pack food items to be distributed to needy families in the Indianapolis community as part of the National Days of Service.**

for volunteering. It's easy to write a check, but it's harder to give up hours of your precious time. If people know going in what's expected of them, then there's no need to be afraid to ask them to make a commitment."

Lysakowski stresses the importance of understanding people's expectations and motivations for volunteering. "Sure, there's always a need for people to stuff envelopes for the direct-mail appeal, but there are a lot more people out there who want to use their skills and talents in other ways."

Volunteer recruiters and managers therefore need to understand how these expectations and motivations vary.



National CASA Association

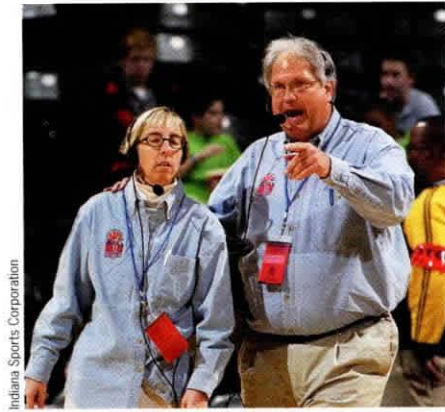
**NCASAA believes volunteerism has the power to save communities.**

## Inspiring African-American Volunteerism

The National Court Appointed Special Advocate Association (NCASAA) believes volunteerism has the power to save communities. That is why it launched its two-year Volunteer Diversity Strategy to increase the number of African-American volunteers serving as foster-child advocates in five states.

As a reliable adult presence in the lives of abused and neglected children, court-appointed special advocates help kids understand that they belong to a community. However, NCASAA, which provides recruiting, training and advocacy for nearly 60,000





Indiana Sports Corporation volunteers prepare for halftime during the 2003 Big Ten Women's Basketball Tournament.

### Volunteers of All Ages

To start, use the age of volunteers as a useful indicator of expectations and motivations. According to CNCS, most volunteers currently fall into one of four broad generational cohorts:

**Silent Generations** (born mid-1920s to early 1940s) tend to seek service-oriented opportunities that are fun and social; they are willing to be managed and directed. Volunteerism among this age group is increasing significantly.

**Baby Boomers** (born mid-1940s through mid-1960s) often prefer opportunities that draw on their professional skills and require minimal oversight; they enjoy collaboration and

negotiation. Although they currently represent 75 percent of the people who volunteer in midlife, they have higher attrition rates than other generations (roughly three in 10 annually, according to CNCS) and may give less time as they age.

**Generation Xers** (born mid-1960s through early 1980s) also prefer not to be closely managed. They often seek volunteer opportunities that engage their social consciousness and are eager to seek positions of increasing responsibility.

**Millennials** (born early 1980s through 2000) prefer shorter, episodic engagement and seek opportunities that promise autonomy, variety and a chance to engage in meaningful work, especially through online social networking. The rise in school-based volunteer opportunities has helped drive an increase in volunteerism in this age group. However, CNCS has found that more than two-thirds of teenage volunteers engage for less than 100 hours a year.

Regardless of their age, however, volunteers require feedback and empowerment to stay engaged.

### Maintaining and Retaining

Thomas W. McKee, founder of the free online resource Volunteer Power ([www.volunteerpowers.com](http://www.volunteerpowers.com)) and co-author,

with his son Jonathan, of *The New Breed: Understanding & Equipping the 21st-Century Volunteer* (Group, 2008), has seen administrators make plenty of mistakes trying to retain volunteers. First among them is simply not asking volunteers how they like—or dislike—their assignments.

“The competition for volunteers is huge, and if you don’t keep them, the organization down the street will get them,” he says. “Without feedback [from volunteers], you don’t know where you stand.”

McKee, who has been a trainer, consultant and author specializing in volunteer management for 35 years, notes that even something as rudimentary as keeping a list of volunteers at your desk and making a check mark every time you talk to them about their work can make answering their questions easier.

“The old question ‘How can you help me?’ should be ‘How can I help you?’” McKee says.

That assistance can include laying out a project’s scope, timeline and budget at the beginning; including volunteers in planning decisions; scheduling regular progress meetings in advance; and then turning the volunteers loose on their project. When they come to you with questions, be available to answer them. Show them they are an important part of your organization. As volunteers gain experience and earn more trust, the experience will be mutually rewarding.

Another common mistake is thinking that if a volunteer seems happy doing a task, that person can keep doing that same task indefinitely. Walter P. “Bud” Pidgeon Jr., CFRE, president and CEO of the U.S. Sportsmen’s Alliance ([www.usportsmen.org](http://www.usportsmen.org)) in Columbus, Ohio, points out that taking volunteers for granted is a sure way to drive them away. “You can retain volunteers much longer if you can diversify their experience over time. Volunteers have to feel like they’re part of the heart and soul of the organization.”

To prevent volunteers from “aging in place,” Pidgeon recommends reviewing other opportunities within the

CASA volunteers nationwide, saw that many African-American communities were under-represented. In Chicago, for example, where 95 percent of the children in foster care are African American, only 7 percent of the volunteer advocates are African American.

Terene Bennett, an NCASAA training specialist, explains that improving volunteer diversity means making no prior assumptions about communities and their stakeholders. “It’s about going to the neighborhood meetings and listening,” she says. “You have to identify the champions, identify how to speak to their needs and connect their passion with yours.”

Dodd White, program specialist for NCASAA’s Mid-Atlantic region, notes that the most effective advocates are those who want to share with their community. “Volun-

teers want to give as well as get. There’s reciprocity.”

By being an advocate for foster children from your community, White explains, you are showing that you are committed to them as much as they are committed to you.

The diversity initiative has helped boost African-American participation in NCASAA programs from 9.5 percent a decade ago to 11.6 percent in 2007.

Bennett and White attribute NCASAA’s success to its grassroots approach. “It has required not only a ‘top-down’ component, but also a ‘down-top’ piece, too,” Bennett says. “You can’t start at the top without the bottom knowing.”

White agrees. “Diversity is broader than just race and ethnicity,” he adds. “It’s about engaging the community as a whole.”



organization with volunteers every two years or so, around the time their passion begins to peak. Volunteers see this as an acknowledgement of their value and they appreciate the time and effort, he says.

As with donors of money, donors of time and skill deserve meaningful acknowledgment, although the forms can vary with the ages of the volunteers and the types of services they offer. Popular forms of acknowledgment include writing and sending personalized thank-you letters; reading names aloud at presentations; printing names in publications, annual reports or invitations to events (especially those in their honor); and awarding plaques or trophies that commemorate milestones.

Pidgeon's study, *The Universal Benefits of Volunteering: a Practical Workbook for Nonprofit Organizations, Volunteers, and Corporations* (Wiley, 1998) has been out for a decade. Changes in volunteering since then, he says, offer some valuable lessons for volunteer managers today. For example, he sees fewer active volunteers from the G.I. generation (born between 1901 through 1924), and he has noticed that

baby boomers are gradually becoming less involved. That makes the job of the volunteer manager that much harder—and that much more important.

"What we have to emphasize to organizations today is that they have to be adaptable," Pidgeon says. "You really have to focus the volunteers on what they can get out of the [experience] and also on what the organization gets out of it. That kind of finesse and talent is what you need in order to get things done."

### Using Particular Skills

Adaptability and finesse become even more important when the honeymoon period ends and the volunteer/staff interaction starts to experience the ordinary ups and downs of any relationship. Good volunteer managers expect the occasional friction and misunderstanding and know how to identify and address them without causing a breakup, says Susan Spero, MA, principal of Spero and Company Consultants LLC in Denver ([www.speroandco.biz](http://www.speroandco.biz)).

"No one walks in the door saying, 'I'm intending to be an ineffective volunteer or board person,'" she explains.

"The problem is what happens between the intention and the execution. Can the board create a culture where people are open, honest and trusting, where everybody remembers that they're working for the same cause?"

Despite the need for excellent management skills when working with staff and volunteers alike, fewer than half of the nonprofits that rely on volunteers have adopted volunteer management practices, according to the study *Volunteer Management Capacity in America's Charities and Congregations: A Briefing Report* (Urban Institute, 2004). Your organization is likely to save more money in the long run if you have in place effective volunteer management strategies to recruit, develop and keep the best volunteers.

Spero notes the following common problems in volunteer management:

- Confusion over who is really in charge
- Resentment or competition between paid and volunteer staff
- Resistance to change
- Unclear accountability or expectations
- Bias from staff members who consider volunteers unreliable or uncommitted

## The Seven Deadly Sins of Recruiting Volunteers

Thomas McKee, a trainer, motivational speaker and co-author of *The New Breed: Understanding & Equipping the 21st-Century Volunteer*, points out that making the following mistakes will not only chase volunteers away, but also burn them out:

**1 Expecting only announcements to get volunteers.** "Many people will never volunteer. Why aren't people volunteering? Because people want to be asked."

**2 Going it alone.** "One of the most effective recruiters I knew was my father. His team would meet once a month with a list of vacancies and brainstorm possible people who could fill those positions. Partnering is another effective way to recruit volunteers."

**3 Recruiting lifetime individuals rather than short-term project teams.** "Many people are afraid of getting tied into a job for a lifetime and never being able to get out of it."

**4 Assuming that "no" means "never."** "Sometimes the 'no' means that the prospect volunteer feels that he or she would rather do something else."

**5 Falling into the BIC ("butt in the chair") trap.** "Most times the chair is better empty than filled with the wrong person who does nothing or is high maintenance."

**6 Being people-driven rather than position-driven.** "When I look at the volunteer team, I think 'position.' I ask, 'What positions do I need to accomplish our mission?'"

**7 Giving the position the wrong job title.** "By the [job] names we use for our nonprofit professional staff, we are telling them that volunteer administration is not their primary job—which it really is."

For more information, visit [www.volunteerpower.com](http://www.volunteerpower.com).



How listening carefully  
to your volunteers can  
make all the difference





- Personality conflicts and “power trips”
- Burnout due to insufficient resources or support

Overcoming these problems comes down to good planning, clear communication and sharing responsibility, Spero points out. “Fiefdoms form in nonprofits, just like they do in the corporate world. You have to tap volunteers collectively on the shoulder and ask, ‘What are the reasons you are here?’ And given that, ‘What do we need to do to work together better to accomplish our goals?’”

Legal liability is another potential source of conflict between staff, boards and volunteers, according to Florence May, president of TRS ([www.theregistrationsystem.com](http://www.theregistrationsystem.com)), an Indianapolis-based agency that supplies online volunteer registration systems to major events across North America. “There are a lot of parameters,” she says. “Expectations have to be very, very clear.”

For example, May asks, if a museum volunteer breaks an irreplaceable artifact, or a volunteer cleaning a homeless shelter throws out his or her back, who is liable? “Usually there’s no lawsuit, but all it takes is one,” she warns.

Managers also need to avoid unintentionally placing volunteers in compromising situations, May advises. For example, booster organizations can run afoul of the IRS when they ask volunteers to work at fundraisers in order to offset dues by the value of time they worked. Not only that, volunteer managers must be able to assure volunteers that their personal information is protected and help volunteers understand how the data are being used.

Most important, however, is to realize just how crucial volunteers are to your organization.

### Unwavering Support

It is a common mistake to assume that in tough economic times fewer people can afford to volunteer and, therefore, an organization can save money by cutting volunteer and outreach activities. Instead, nonprofit leaders must be willing to maintain support for their volunteer programs, says Susan Ellis, president of Energize Inc. ([www.energizeinc.com](http://www.energizeinc.com)), a Philadelphia-based consulting firm specializing in volunteerism-related issues, and author of *From the Top Down: The Executive Role in Volunteer Program Success* (Energize Inc., 1996). In a budget crunch, the volunteer coordinator position is often among the first to get cut because it is seen as a “soft” position.

“Volunteers, by definition, are part-time workers with a wide range of skills and schedules, so they can’t easily coordinate themselves,” Ellis explains. “A creative volunteer program manager can focus on attracting the best people and then assure they contribute most effectively. So why eliminate the one position that can provide new resources, regardless of money?”

Organizations should assess the return-on-investment of their volunteer programs, Ellis suggests, to see the enormous value of volunteer services against the relatively low cost of creating and managing an effective volunteer program. In *From the Top Down*, she suggests assigning a dollar value to volunteer time and in-kind contributions using the following formula:

**Cash expenses + the value of contributed time and materials = the true cost of service**

Ellis’s book includes a worksheet to help you calculate this number for your organization, although she warns that

### Resources

The reports cited in this article can be found on the following websites:

*Volunteer Growth in America: A Review of Trends Since 1974*

[www.nationalservice.gov/pdf/06\\_1203\\_volunteer\\_growth.pdf](http://www.nationalservice.gov/pdf/06_1203_volunteer_growth.pdf)

*Volunteering in America: 2008 State and City Trends and Rankings – Research Highlights*

[www.volunteeringinamerica.gov/assets/resources/VIA\\_Brief\\_FINAL.pdf](http://www.volunteeringinamerica.gov/assets/resources/VIA_Brief_FINAL.pdf)

*Volunteer Management Capacity in America’s Charities and Congregations: A Briefing Report*

[www.nationalservice.gov/pdf/vol\\_capacity\\_brief.pdf](http://www.nationalservice.gov/pdf/vol_capacity_brief.pdf)

the “value” of these contributions is far greater than a simple cost-replacement calculation. “People want the 10 steps that work,” Ellis admits. “The point is that it is far more complex than people often think it is. The good news is that today you don’t have to reinvent the wheel. Learn from others.”

Make sure your volunteer management program is prepared for these complexities before courting volunteers. In the wake of 9/11, Hurricane Katrina and other natural and man-made disasters, volunteerism has surged as people seek to make a difference within and beyond their communities—and most experts predict that the faltering economy will increase, not dampen, that spirit. While financial donations may stagnate, donations of time and services are likely to increase. In other words, there are a lot of people out there looking for serious relationships. Is your nonprofit ready to make the commitment? ☛

The AFP International Conference on Fundraising in New Orleans, March 29–April 1, will offer several sessions on volunteers, including “How to Turn Your Volunteers into Your Fan Club” presented by Florence May; “Board, Staff and Volunteers: Can This Marriage Be Saved and Even Thrive?” presented by Susan Spero, MA; and “Volunteerism: Supporting the Covenant with Black America Through Greater Community Involvement” presented by Terene Bennett and Dodd White. For more information, visit <http://conference.afpnet.org>.



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