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## Volunteers as Beta Testers

By [Susan J. Ellis](#)

November  
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Back in 2009, I wrote a Hot Topic on “[Taking the Client’s Perspective in Designing Volunteer Roles](#).” I proposed a number of ways an organization could capitalize on the ability of its volunteers to understand the needs of clients in different ways than the paid staff can. All of the ideas in that piece are still relevant and worth revisiting. Let me add some new ones from more recent observations.

Volunteers are in the unique position of what I call “insider/outsiders.” Most employees approach their jobs from a specific professional perspective and may be too close to their work to see the whole forest for their species of trees. Volunteers, on the other hand, bring a wide range of educational and occupational backgrounds (including differences in age and other demographics). Collectively, they have a much broader point of view. They still think like members of the public but have also made a commitment to your organization, so you can count on their input as based on wanting the best for you and for those you serve. This ability makes them ideal “beta testers.”

Our organizations are always moving forward on new projects, expanding services in different ways, possibly renovating or building new facilities, responding to additional legal requirements, and more. Even cutbacks bring change. The staff responsible for planning and implementing such activities are immersed in the process, as professionals. In other words, they are applying their expertise and training to the intellectual challenges of the new task. The problem is that the greatest impact of the changes is on your clients or consumers, not on the staff. By the time those service users give feedback, it may be too late (or expensive) to fix bad decisions. Doesn’t it make more sense to pilot test options much earlier in the process?

The solution? Ask current volunteers for their opinions and ideas *during* the planning and then to beta test the experience as plans are implemented. They will be stand-ins or surrogates for real clients later on. Here are just a few situations in which this could be invaluable:



- *Renovations, building from scratch, choosing new facilities:* What issues do volunteers raise about the plans or new site? How easy or intuitive is it to move around and find where to go? Is anyone worrying about the distance from the parking lot or drop-off point to where someone enters the building? Are restrooms conveniently located? Where do they hang their coats or put snow boots? It's not that architects or paid staff don't care about such things, nor that they haven't been considered before. But because volunteers are *not* focused on service delivery, they are more likely to notice things a visitor or client might care about.
  - If you often have visitors with a physical disability or who come with small children, make sure you recruit volunteers who have personal experience with those issues to review your plans.
- *Selecting furniture and more:* Who would be better suited to select the furniture in your waiting room or reception area: paid staff who spend their day in their own offices, or volunteers who can understand what someone waiting around might want? I'm a member of a great film society that renovated its theaters. They put five different theater seats in the lobby for a month, inviting all film goers to sit in them and then express their preference. As members, we felt included in the renovation process. Do your volunteers feel included? At least, ask them for their opinion.
  - This can extend to such questions as "What would you like to see in vending machines in this area?" "What do you think of the magazine selection?"
- *Navigating your Web site:* As noted, volunteers already know a lot about you, yet they remain part of the public at large. So why not ask them to find things on your Web site and report how long it took? What questions do they have that were not answered on your site (or not found)? Does your site feel friendly or official and bureaucratic? Is it written in graduate school language or is it too simple? Is it clear what someone should do if they want to learn more?
  - Are there parts of the site that guide the user through any steps to complete a form, application, purchase, or other activity? Do the volunteers find those easy to understand and follow?
  - As an added test, if your site provides "contact us" forms submitted electronically from the site, ask volunteers (even just a few) to complete them and report back on how long it took to get a response!
  - If you have volunteers who answer the phone for your organization, ask them what are the most common questions they receive. Then, make sure the answers to those questions are on the Web site.

- *Filling in new forms*: The creators of a form know exactly what they mean with every question or they would not have written them that way. But does the person completing the form understand and, more importantly, give useful answers? In full disclosure, at my old job at the Philadelphia Family Court, we didn't want prospective volunteers to feel that advanced education was a pre-requisite to getting involved with kids on probation. So, in an attempt to encourage open-ended responses rather than "school, degree, date," we included this: "Please describe your educational background." At least once a month someone responded, "Awful!" I learned my lesson!
- *Pre-testing an exhibit, open house, or other event that will be open to the public*: Rather than simply invite volunteers to take part in an event open to the public (which is certainly important to do), up the ante by specifically asking them to "experience" the venue, exhibit layout, and other elements *before* outsiders do. This lets you check crowd control, the usefulness of (or missing) signage, and learn what questions a participant may have that you didn't expect.

Whether you invite all volunteers to serve as such beta testers or select specific ones for each project based on their relevant perspectives, *volunteers will love these requests!* It's a change of pace with a purpose. It treats them as part of the team, with a different role than that of the paid staff. Yet they can provide feedback information that is extremely useful.

Further, if you engage volunteers during the early stages of something new, and act on valid suggestions they make, they will feel a sense of ownership and commitment to the activity or building. This will make them even more valuable as community ambassadors and as guides to your clients when they ultimately make use of the services.

## Continuing Eyes and Ears

As with any call for suggestions, the organization is never obligated to act on what volunteers report – though it would be strange if they didn't seriously consider useful feedback. Conversely, volunteers should not expect that every idea proposed will be adopted. But the leader of volunteer resources should take responsibility for creating a practical *feedback loop* in which volunteers provide ongoing observations to the staff and staff request volunteers to be alert to certain things.

Obviously, if you have asked volunteers to beta test things as discussed here, they should be asked to continue reporting what they hear from clients or visitors as the new service or facility is in use. This includes praise as well as complaints! They should also be encouraged to keep an eye out for things that need repair or new client needs that surface (again, what about those snow boots?).

To accomplish this, the possibility of being a beta tester and role of ongoing observer should be noted in all interviews of prospective volunteers and perhaps added into all volunteer position descriptions. Train volunteers in what to do with feedback or a new idea – not blurt it out inappropriately. So you

may need a suggestion form (on paper or online) which can then be passed along to the right paid staff.

Be sure to include any beta testing activity in your monthly and annual reports on volunteer accomplishments. Celebrate it during any recognition event, too. Done well, there are only positive outcomes of this whole idea!

- How have volunteers provided feedback to your organization during the planning of something?
- Do you have a system for ongoing feedback? Please share.
- Are there any reasons you are opposed to these ideas?

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## Comments from Readers

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*Submitted on November 5th, 2015*

*Don Rhodes, Central Otago, New Zealand*

Once again Susan, excellent stuff.

One thing I found when engaging Volunteers as you promote, is to ensure their suggestions are managed correctly ie give them REAL consideration, but also let the Volunteers know their ideas may not be accepted but that must not deter them. Oftentimes I have observed Volunteers get really "down-in-the-mouth" when a suggestion is not taken on board even though it was given due consideration.

Other than that, very good article which I will pass on to my clients to absorb.

Cheers. DonR.

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*Submitted on November 6th, 2015*

*Susan J Ellis, Energize, Inc., Philadelphia, PA, USA*

Thanks, Don -- I did try to warn about this but really appreciate your emphasis on it. I suspect that some organizations do not ask for volunteer opinions *because* of this very fear: that they will open the door to an endless stream of suggestions and they will not know how to say "no." So, yes, everyone has to understand the parameters here. What is not open to change? Who will make the decision? Etc. Also, if every volunteer understands that s/he is one of many voices giving input-- by design -- there is less chance of insult.

One good idea may be to avoid "voting." The point is not to say yea or nay, but to collect opinions and ideas to be considered.

Finally, the key is to acknowledge the cumulative effect of all the tester responses by reporting back 1) a summary of ideas and 2) what WAS accepted by decision makers and perhaps why some ideas were not feasible to implement. Volunteers want to be heard, not necessarily have the final say. So make sure they feel their input had some value even if the changes made are not the ones they favored.

Thanks again.

Susan

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