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STICKY BUSINESS

Strategies for managing volunteers who fall out of step

By KIM FERNANDEZ

Mary Feller could hardly believe her ears.

It was her campus's annual alumni meeting, and she was sitting in an audience of more than a hundred people, including donors and the press. And there on stage with a microphone was the alumni board president delivering a speech that openly criticized the new interim president.

Shrinking in their seats, Feller, then assistant vice president of development, and her colleague, the director of communications, knew they needed to talk with the director of alumni relations and the vice president for institutional advancement to devise serious damage control strategies.

This story might sound a little outrageous, but problematic volunteers are not all that uncommon. "It's an emerging problem," says Kay Sprinkel Grace, author of *Fund Raising Mistakes that Bedevil All Boards (and Staff Too)*. But "the thing to remember is that volunteer outbursts are a manifestation of how much volunteers care about where they're invested."

That trade-off can be tough to bear in mind, advancement professionals say. "Anyone who's been in this business for any significant time recognizes these behaviors and incidences," says Paul Sheff, vice president for development and alumni relations at the College of the Holy Cross. "They are unfortunate, but they happen."

So what's an advancement professional to do? It's not possible just to tell volunteers "no" when they want to charge in with their own ideas or ask them to apologize or turn over a project to someone else when they've committed a faux pas. Or is it? Working with

volunteers can be a nightmare when they step out of line, either intentionally or accidentally. But careful prep work before allowing volunteers to take on their roles can minimize the risk.

THE BULLHEADED

Rob Henry, director of individual giving at Yale University, says he didn't expect to be steamrolled when a volunteer came to him asking to start a new alumni giving program. The idea had merit, but it didn't mesh with the university's established plan. "Initially," Henry says, "I said no. The timing wasn't appropriate."

Undeterred, the individual approached other volunteers and donors with the idea and came back to Henry to say the group was going to proceed anyway. In fact, they had already set a meeting schedule and preliminary plans to launch their giving group.

Henry and his staff realized two things. First, this group was well on its way to becoming a reality, with or without them. And second, the only way to rein in the volunteers was through gentle persuasion and creative structuring.

Henry went back to the volunteers and told them how much he supported their idea of a new giving society. At the same time, he said, he'd like to fold it into his larger giving umbrella so that it would have greater impact, and they changed it from a giving group to a giving society. "You have to educate volunteers sometimes that we can't do a specific activity or program today because we have a greater vision for tomorrow," he says.

Advancement officers need to think of themselves as managers of people instead of firefighters constantly reacting to new situations.

When Henry pitched the idea in that revised context, the lead volunteer said he loved the structure and looked forward to working with staff to make his idea a reality. “We again emphasized it as a worthwhile project and that it needed to be managed through the development office,” Henry says.

Henry also has dealt with volunteers who have taken similar ideas to the alumni fund chairs who then become enamored with the plans and demand that the staff begin new programs as quickly as possible. Tact, he says, is key in taming that beast.

“We try to get them to understand how their ideas fit into the greater development effort,” he says. “We walk them through the process and identify what we can accomplish versus what we can do well. Their response is often, ‘Here are six things. Why can’t we do them?’ My response is, ‘We can do

them. The questions are, can we do them well? Can we create them as a long-lasting program? And what do you want to put your name on?’” Faced with that rationale, he says, most volunteers happily concede.

That strategy, Grace says, is among the most successful and vital she’s seen. “Without awareness of what staff members are doing, volunteers can perhaps make some uninformed observations,” she says. “They then become very frustrated when they don’t get their way.”

Advancement officers need to think of themselves as managers of people instead of firefighters constantly reacting to new situations, she says, adding that advancement officers need to communicate carefully to avoid saying, “‘Well, this is my job, and it’s not yours. You stand over there and watch me do this. I’m the professional.’”

One of the best ways to avoid sending such a message, Henry says, is to keep volunteers in the loop by letting them know what decisions staff members make and

how they make them. Giving volunteers a glimpse of the bigger picture often can stem the tide of over enthusiasm that usually accompanies new ideas.

OTHER PROBLEMS

One phenomenon that Grace has observed on campuses is a blur between the roles of advancement professionals and volunteers, partly because greater numbers of influential, take-charge businesspeople want to volunteer for their alma mater. Accustomed to being hands-on and in charge on the job, they anticipate having the same kind of role in their volunteer life, which sometimes can come across as pushiness.

Steve McCurley, author of *Handling Problem Volunteers*, says the first step in handling volunteers who act like bulldozers is determining why. “You have to figure out if their actions are a result of their personality or if there’s something in the volunteer situation that’s aggravating their

in short

CACHE COW. Looking for volunteer management information on the Web? Skip the search and bookmark these three comprehensive sites instead. At www.serviceleader.org, you’ll find a variety of resources, including *The Virtual Volunteering Guidebook*, a free publication that addresses all aspects of managing online volunteers. The resources section of the Association for Volunteer Administration’s site—www.avaintl.org/resources—offers a complete bibliography of pertinent books and publications, links to dozens of related organizations, AVA survey results, and more. For a UK perspective, check out www.volresource.org.uk/briefs/volunteer.htm, which includes links to information about volunteer management training, software, and more.

GOOD COP, BAD COP. Policing is hardly a term advancement practitioners would use to describe their interactions with volunteers, but the volunteer management beat can be trying. Although the positive experiences far outweigh the negative, advancement pros need to be skilled in handling all kinds of volunteers and situations. For perspectives and tips on managing the good, the bad, and the ugly, check out the lineup of helpful articles at www.volunteerpower.com/articles/index.htm, including “Managing the High-Maintenance Volunteer,” “Firing High-Maintenance Volunteers,” “How to Unleash the Visionary Volunteer,” and more. In addition, the “Resources” section of the site is a good source for sample documents, including a code of conduct for board members and interview questions.

behavior,” he says. “Highly motivated volunteers end up being frustrated by their perception that the organization is unable to move as fast as they’d like and in the direction they’d like,” he says. “It creates a lot of pressure to achieve results, and sometimes those results are realistically beyond what an organization can do. Volunteers who can’t adjust to that fact can be dangerous. They will challenge the organization, sometimes in private and sometimes, unfortunately, in public.”

Holy Cross’ Sheff says he’s seen committees come to consensus decisions only to have individual volunteers actively work to undermine them. And Feller, now director of institutional advancement at Graland Country Day School, says she once had a volunteer stand up to deliver a speech at an alumni event with no notes and no preparation, embarrassing himself and the institution with his rambling. She’s also had volunteers be so aggressive with fund-raising

calls that parents and alumni call to complain about it.

MOTIVATION AND PREPARATION

No matter what a volunteer has done—or failed to do—volunteer managers need to have a practical strategy to remedy almost any situation.

“Assess whether what happened was deliberate or inadvertent,” Sheff says. “Clearly, if it’s inadvertent, one might choose to do nothing or might want to have a gentle conversation with that person about expectations.”

Grace says advancement officers usually can easily rectify inadvertent mistakes such as saying untrue things in public. “Generally, you want to approach volunteers and tell them that the statement they made in public is not based on fact,” she says. “You tell them you’d like them to understand the campus’s position, and ask them to team up with you in withdrawing the statement. Unless the person is

angry and trying to put inaccurate things out there, he or she will generally cooperate.”

But the best way to deal with public flubs or inadvertently inappropriate behavior is to circumspect it altogether by training volunteers and clearly explaining expectations and roles at the outset.

“One thing to build into your training is raising the consciousness among volunteers that they might appear to be speaking on behalf of the institution, even if they’re not aware that’s what they’re doing,” McCurley says. When they do speak off topic, they need to explain clearly that it’s their personal opinion, and that they are not speaking on behalf of the organization, he says.

Many advancement officers develop job descriptions or agreement letters for volunteers to explain exactly what their roles are, clarify the responsibilities of staff members, and outline who does what in an official capacity. “You really can’t handle a [problematic]

REMOTE CONTROL. Managing and organizing off-site volunteers can be challenging, but you can get a better grip on the process by relying on weekly advice and insights from volunteer management experts. Every Wednesday, check out the latest edition of *Volunteer Management Review*, one of CharityChannel’s many e-newsletters. Recent articles include “Saying No by Saying Yes, or How to Turn Volunteers Down in a Positive Way,” “The Balancing Act of Volunteer Management: What to Do When Dealing With Ethical Dilemmas,” and “When People Disagree: A Guide to Dealing Effectively with Conflict in Your Volunteer Program.” To read these articles and more, go to www.charitychannel.com/enewsletters/vmr and search by title.

A TEXTBOOK CASE. Even if space in your office library is limited, be sure to make room on the bookshelf for *The Volunteer Management Handbook*. This comprehensive reference, edited by Tracy Daniel Connors, outlines the fundamentals of establishing and maintaining an effective volunteer program and offers practical guidance on recruiting, retaining, motivating, training, recognizing, and rewarding volunteers. The book’s chapters, written by nonprofit leaders, also address developing volunteer management policy manuals, risk management strategies, general liabilities and immunities, and more. To order the 432-page paperback (\$47 list price), go to www.wiley.com or your favorite online bookstore.

Advancement officers need to be able to discern when something happens because a volunteer didn't understand a particular situation and when something happens because someone has violated agreed-upon terms.

situation if you haven't expressed at the beginning what you specifically want the person to do," says Susan Ellis, president of Energize, Inc., a Philadelphia-based consulting and training firm specializing in volunteerism. "Everyone makes assumptions, and that can be a real danger." Advancement officers need to be able to discern when something happens because a volunteer didn't understand a particular situation and when something happens because someone has violated agreed-upon terms. "A lot of this has to do with writing down what you want somebody to do," she says.

Ellis recommends calling such written statements *assignment outlines* or *briefing sheets* if the term *job description* won't do, but she acknowledges that the content of the document itself is far more important than its title. "Write out the goals and expectations of volunteers," she says. "Discuss the document, and if necessary, have them sign off on it. Tell them what tools, resources, and access they have before they go out. Have a phone call or e-mail exchange before volunteers start working on your behalf. You don't want to find out three weeks later that the work isn't being done the way you wanted."

McCurley agrees that the volunteer manager should do what any supervisor would do—spell out what's acceptable and what's not when it comes to working with other people. "People who are good fund-raising volunteers tend

to have assertive personalities, and they may not mix well with some people," he says.

Ellis recommends spelling out how frequently staff members and volunteers will communicate, either in person or by phone, while the project is ongoing. "You want to set dates to talk and then follow up on those dates," she says. "This lets you know what's going on and lets volunteers know you'll treat them in a businesslike manner." People often are afraid to use formal methods when working with volunteers, she says, but it's best to do so at the start and be matter-of-fact. "Look at it as supporting the volunteers, not controlling them. Let them ask questions, cheer them on, and make the calls or e-mail conversations meaningful to them as well. Give feedback and let them ask questions."

Establishing the frequency of contact at the outset, Ellis says, can reveal a lot about volunteers and the way they'll work with others. "If you ask to talk by phone every week but a volunteer says that seems too often, explain that you need to mesh their progress with the progress of others," she says. "If the volunteer still resists frequent checking in, that's a warning sign."

Grace says that even a verbal discussion about expectations at the outset of a volunteer relationship can work wonders, especially if the advancement officer can frame it in such a way that is appreciative

of the volunteer's obvious interest in and passion for the organization while being very clear about his or her role, she says. "We've had the CEO and boards of organizations sit down for open discussions about what each expects from the other and where the boundaries are. It's also important to tell them what you don't want them to do."

NEW DIRECTIONS

Despite training, written goals and expectations, and open and frank conversations, some volunteers will continue to act inappropriately. Henry remembers one man who approached him to volunteer—an alumnus who had volunteered several years before and fired off letters directly to the university president when things weren't to his liking. "He'd see a report and assume the numbers were incorrect, and he'd send a letter to the president," Henry says.

Luckily, he found a way to accommodate the alumnus and avoid a repeat of the previous episodes. "You never want your alumni to feel that the institution doesn't value their ideas or efforts," he says, "so you find ways to use their enthusiasm to create momentum for the institution. If you have trigger-happy donors who love sending letters to key campus officials, use their skills to assist in editing correspondence"—which is just what Henry did with the aforementioned volunteer. "Think

creatively about ways to energize and redirect their talents.”

Redirecting volunteers to behind-the-scenes jobs where they’ll be less of a liability is a common solution to problems that arise when things are likely to spin out of control more publicly. “It can be tricky,” Feller admits, who says she’s used the technique to minimize the damage from particularly enthusiastic volunteers who come off as pushy or as bullies. “They need to feel like they’re doing something really important, and you need to move them out of an area where they’re causing friction.

“My preference is to move volunteers into an area that’s a little less public but still has prestige attached to it,” Feller adds. That said, she’s also had situations where she needed to terminate the volunteer relationship. “Over the years, there have been people who have been offended and gone on their own way.”

Sometimes that’s the only resolution, despite everyone’s best efforts to salvage the relationship. And that’s true even if the volunteer is a major donor. “Big donors can be bullies sometimes,” Grace says. “But they’re volunteering. You give them the same kinds of feedback you would if they were not big donors. Otherwise, it absolutely disrupts the fabric of the board and the community.”

Sheff says that no matter what the ultimate resolution, it’s vital to keep a cool head and try to keep the volunteer calm during



conversations. “Whatever I’m going to do, I try to make sure the temperature is dialed down for as long as possible,” he says, by being diplomatic, keeping confrontation to a minimum, and staying friendly and upbeat.

One of the most important decisions to make, he says, is figuring out who will talk to the problematic volunteer about his or her actions. He recommends that a staff person and another volunteer team up in those discussions to avoid power struggles between paid staff members and alumni volunteers. Conversely, getting the campus CEO involved will really get the fires going, he says. “That’s probably not a good thing to do.”

McCurley recommends using another volunteer to act as a middleman whenever possible. Have another strong volunteer leader talk to the problematic person on a peer-to-peer level to explain the consequences of his or her actions and the institution’s policies and protocol for handling such situations.

Sheff agrees. “One of the best pieces of advice I ever received was from a colleague who said to always try to put someone between you and your problem—that person being another volunteer. As a staff person, it can get very sticky very quickly when you get involved.” Another volunteer can be more of a peer, he says,

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and there’s a better chance of having a calmer, more considerate conversation.

Even so, it doesn’t always work. “When it’s clear that a person has no intention of changing,” Sheff says, “you say something like, ‘You have fundamental disagreements with the direction of the committee, and it must be difficult for you to participate in meetings. Perhaps it would be easier for both of us if you were no longer a participant.’ When you’ve made the judgment that the person is subverting the board [or projects], that person is already a loose cannon. You might as well sever the relationship.”

Grace says that ultimately, advancement officers must deliberately confront volunteers who are making things miserable for everybody else. If not, it will spoil the excitement, the experience, and the investment of time and money of everybody else for the benefit of that one person. “We wouldn’t allow conflicts to escalate within the staff, but we often allow them to escalate on our boards and committees.” ■

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By JENNIFER J. SALOPEK

Culture Club

Training volunteers for the long run

Vision. Mission. Campus culture. These concepts, which help define institutions, can be difficult to articulate to someone off campus. Although much may lie in the eye of the beholder, any institution's top volunteers must share the same understanding of these intangibles as paid staff to represent the campus effectively.

Development, alumni relations, and communications officers struggle with a common problem: how to provide volunteers with enough information to work effectively without overwhelming them. As they strive to strike that balance, advancement professionals everywhere have created and refined strategies to train top volunteers in vision, mission, and campus culture.

RECRUITING THE RIGHT PEOPLE

Before campus staff can train volunteers, however, they need to recruit them. Each top volunteer position requires certain abilities or skills; it is wise to write those down, along with the primary responsibilities of that position, in a job description. This exercise can help both to clarify the job and to avoid any confusion or misunderstanding on the part of the volunteer.

David Morrissey, assistant vice president for university relations at the University of Notre Dame, oversees 15 advisory councils, which consist of about 500 individuals appointed by the university's president. The councils advance the growth, in the broadest context, of the university's principal academic endeavors—from its colleges to the campus art museum.

A volunteer chairperson, recruited by a steering committee of deans and directors, leads each advisory council. The steering committee looks for strong leadership and the ability to be an effective spokesperson, active engagement with the university and the council, and an understanding of the university's priorities with the capacity and willingness to help meet those needs.

"There is a tremendous number of talented people who are willing to work for the university in a meaningful way," Morrissey says. "That is a very exciting part of our council structure. The challenge is to identify the academic units' needs and fit them with the skills and interests of the council members."

At most institutions, volunteers in top jobs such as campaign chairs and board members probably understand campus mission and culture already. This is certainly the case at the University of Minnesota, which has a 15,000-member legislative network supporting its state advocacy efforts. (Some 70 percent of the university's alumni live within a 50-mile radius of the university's Twin Cities campus.) The network is guided by a 15-member standing committee of the national board of the University of Minnesota Alumni Association. "Committee members include current board members with advocacy and public policy experience, several past national presidents of the association, and key alumni who are active in community affairs," says Cheryl Jones, association deputy director. This group stays informed about university issues

and stands ready to speak on behalf of the university.

Other important volunteers at the University of Minnesota include the nine-member executive committee of the alumni association. In recruiting volunteers, the association's nominating and board development committee follows a philosophical document called "Personal Characteristics of Future Leaders," which recommends seeking such desirable traits as public credibility, facilitation skills, and a passion for the university.

Other top volunteers at various institutions develop their understanding of campus mission, priorities, and goals over time as they move up through the ranks of service. At many institutions, some volunteer positions are—formally or informally—a training ground for other top-level spots. For example, some members of the University of Wisconsin Foundation board previously were active in the volunteer leadership of the school or college from which they graduated. At the University of Notre Dame, the advisory council program often is preparation for the university's board of trustees: "It's not unusual for trustees to have served on an advisory council," Morrissey says.

At Westminster College in Pennsylvania, the top volunteers with whom Alumni Relations Director Mary James works are the alumni council leadership—the chairs of the council's five standing committees plus its president and vice president. "Council members are groomed for other positions such as alumni representative to the board," she says.





Volunteer training sometimes can serve both the institution's purposes and provide a perk to the volunteer.

TRAINING THE TROOPS

Once volunteers are recruited and ready to go, staff members need to focus on preparing them rather than setting them loose without training and materials. Otherwise, chances are good they will become frustrated with the lack of support and not meet the institution's expectations. In addition to providing written job descriptions, many institution leaders give volunteers a training handbook. Westminster's volunteers receive a three-ring binder that includes a section on each of the five standing committees. The handbook for board members of the University of Minnesota Alumni Association is entirely Web-based.

At Pomona College, some top volunteers receive manuals, says Richard Watkins, senior director of alumni and parent relations, who works with top volunteers on annual giving, reunions, the alumni association, and the parents' committee. "I would like for all of them to get manuals in the future," he says. The notebooks include job descriptions, timelines, and sample letters. Watkins plans to incorporate even more tools for volunteers who are actively involved in soliciting gifts. For example, to increase and reach a nationwide network of volunteers, he is hoping to offer a few regional training sessions using staff and seasoned volunteers in the orientation process to ensure solicitation competency and comfort. Watkins believes this also is a good opportunity to keep these volunteers well-informed about the campus community because they do not live in the area.

Wabash College, which recently completed a six-year, \$100 million-plus capital campaign, provided its volunteers with a handbook that included general information about campus fundamentals, campaign projects, and support materials for fund-raising training. Volunteers for the follow-up campaign to renovate and refurbish campus fraternity houses received a more detailed manual, says Nancy Doemel, senior advancement officer and coordinator of volunteer services at Wabash.

FACE TIME

Although written materials are helpful training tools, some advancement officers prefer to inform volunteers about campus vision, mission, and culture through in-person training sessions. How campus leaders plan and carry out these sessions varies greatly, running the gamut from annual group sessions on campus to one-on-one training meetings conducted by advancement officers at volunteers' homes.

John Gore, director of alumni relations and the Lawrenceville Fund at the Lawrenceville School, is a believer in the individual approach. "Annual, formal training was not successful for us here, so we take it to the troops," he says. As he travels the country on behalf of the school, Gore meets with top volunteers whenever possible and provides some refresher training. "We have a module in our hip pockets we can flip out at any time." The module includes a primer on the school's finances and how annual giving fits in,

in short

MOVE OVER PEOPLE MAGAZINE. Proving true the theory that there is a publication for everyone, now volunteer managers have something to call their own. *e-Volunteerism*, a quarterly online journal, offers in-depth coverage of the volunteer management field. The interactive journal addresses a range of issues, including dealing with aging volunteers, training volunteers to become advocates, and starting family volunteering programs. Subscribers (a yearly subscription is \$40) also have access to archived articles and printable training materials and can participate in electronic roundtable discussions. For more information and to read article synopses, go to www.e-volunteerism.com.

QUIZ WIZ. Penn State University alumni volunteers might have thought their test-taking days were over. But not just yet. To help ensure that all admissions volunteers share current information with prospective students during recruitment events, PSU's admissions office created an online training module that volunteers must complete. The slide-format presentation covers four major areas—academic programs, admissions, financial aid, and campus life—and includes quiz questions scattered throughout. Volunteers can test their knowledge and keep track of their score but don't have to submit their results. To view this training module, go to www.psu.edu/admissions/volunteers and click on "New Volunteer Training."

an abridged version of the class volunteers handbook, a table of gift levels, and sample class communications pieces. Gore usually can cover all of these items over lunch or in a 30- to 40-minute meeting. He also notes that for more routine training tasks, he is exploring Web-based training—but with reservations. “You really need to look people in the eye and take their measure [for this work]. You can’t fax a haircut, as they say.”

Westminster’s James meets with the college’s alumni association president every summer. Together they review goals, set priorities, generate ideas, and review the calendar for the year. Then at the first alumni association meeting every fall, committee chairs cross-train each other by reviewing committees’ purposes, accomplishments, and goals. In addition, the campus CEO provides an informational overview for the year ahead.

Many institution staff members ask top volunteers to return to campus for training. That was definitely the way to go for Doemel, who worked with about 250 Wabash volunteers between 1998 and 2004. She held a volunteer workshop on campus in the spring before the campaign kickoff and every March of the campaign’s duration. As part of the campaign, Doemel and Wabash’s major gift officers provided fund-raising training primarily through role playing to teach volunteers how to phone a prospect for an appointment, how to make an ask on the phone versus in person, when to back off, and so on. They

also provided training via conference call as a follow-up or for those volunteers who could not attend the campus-based sessions.

Don Gray at the University of Wisconsin Foundation says he frequently trains volunteers, faculty, and advisory board members of the university’s schools, colleges, and departments. For fund-raising volunteers, Gray reviews how the major gift process works and how volunteers can be important players at every stage. “We encourage deans, faculty, and volunteers to assume an active role in the development process and to see themselves as critical and vital members of the overall development team,” Gray says.

Every fall, new members of Notre Dame’s advisory councils participate in or attend an orientation session, which includes an annual address by the university president to bring them up to date on current priorities and refocus them on Notre Dame’s culture and needs. Volunteers at Pomona College also gather on campus for a group orientation, and fund-raising volunteers receive ongoing training and support on an as-needed basis. For example, immediately after the December tsunami in Asia, Watkins and his staff advised volunteers on how to time their contacts with donors and make the case for Pomona sensitively in the face of the disaster.

Volunteer training sometimes can serve both the institution’s purposes and provide a perk to the volunteer. Westminster College initiated a program for its volunteers last year that provides training

STATISTICAL SMORGASBORD. Anyone who relies on the time and effort of volunteers knows that their work is immeasurable. Nonetheless, consider these figures. The Bureau of Labor Statistics (www.bls.gov) reports that between September 2003 and September 2004, approximately 64.5 million Americans volunteered at least once. (See “Fleet of Feet” on page 30.) The Points of Light Foundation (www.pointsoflight.org) breaks down volunteerism by state, and Utah tops the list with almost 50 percent Utahans volunteering in 2003. What’s all this volunteering worth? According to research from Independent Sector (www.independentsector.org), volunteer hours were valued at an estimated \$17.55 per hour in 2004.

MYTH BUSTER. Conventional wisdom might lead you to believe that retirees are more likely to volunteer than younger adults. Not so, according to *Reinventing Aging: Baby Boomers and Civic Engagement*, a report by the Harvard School of Public Health–MetLife Foundation Initiative on Retirement and Civic Engagement. Volunteerism peaks in mid-life and then declines into retirement. The report also notes that although baby boomers have not been as eager to volunteer and join community groups as their parents’ generation, this could change in their retirement years with large-scale recruitment efforts. To view the 160-page report, go to www.hsph.harvard.edu/chc/reinventingaging/Report.pdf.



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that not only supported the college's goals, but also strengthened volunteers' other community roles. Designed to develop volunteers' skills in fund raising, student recruitment, and event planning, the workshop served as both a thank-you for volunteers and a way to enhance their sense of connectedness with the college. "By providing this workshop, we trained our volunteers in such a way that they are not only more effective for us, but also can put those skills to work for their many other good efforts," James says.

In addition, engaging volunteers in projects and issues that are significant to alma mater is a productive and hands-on way to train them in institution priorities and keep them in sync with campus culture. For example, Lawrenceville leaders consulted the alumni association when the institution decided to change the school song, and executive committee members also were involved in interviewing candidates for headmaster a couple of years ago. During Pomona's search for a new president in 2002, nearly 20 alumni volunteers interviewed candidates.

At the University of Minnesota, members of the influential advocacy committee reviewed the university's new strategic plan. After a series of closed-door sessions, the committee issued a position statement in support of the plan. Currently, top volunteers are involved in the plan's implementation; the university formed 25 task forces with at least one alumnus or alumna on each.

STRIKING THE BALANCE

As advancement practitioners at Westminster College recognized, top volunteers often are influential members of their community and other organizations. Their days are full and their time is limited. Many alumni and development professionals struggle with ongoing communication with volunteers. How much is too much? And how little is too little?

Most staff members take advantage of the convenience and speed of e-mail for regular communications with their volunteers. Wisconsin's Gray sends e-mail updates to his foundation board members three to four times a year. Volunteers for Westminster receive a weekly e-newsletter, and class agents at Wabash—those individuals representing each graduating class—receive a monthly e-newsletter about general college news. Lawrenceville's headmaster e-mails volunteer leaders every other month. Pomona annual

fund volunteers receive a quarterly print newsletter, *Blueprint*.

For many campuses, the quantity of communications with volunteers is not as crucial as the quality. Communications from and exposure to the campus CEO is an important way of keeping volunteers involved while also demonstrating their value to the institution. The president of Westminster College addresses two of the three alumni council meetings each year, and the president of Notre Dame meets with advisory council members and their spouses in a special session each fall.

At the University of Minnesota, the president attends all five national board meetings every year. Jones struggles with how much additional communications volunteers should receive. Because so many alumni live close to campus, they get a lot of general university news from local newspapers and television. "Our volunteers are very busy; I try hard to prioritize what information I provide to them," Jones says, noting that the university is decentralized—its 20-plus collegiate and other units send out their own communications as well. She sends an e-mail update to alumni association board members every other month.

Informing volunteers early and personally during a campus crisis is important volunteer communication and stewardship, Morrissey says. When such an occasion arises, Notre Dame's office of special events and protocol notifies council members immediately via e-mail or broadcast fax. At Wisconsin, the university chancellor usually issues a white paper after a crisis, which he sends to volunteer leaders by e-mail or regular mail. "The chancellor also has a very active Web site," Gray says, which provides up-to-date information on campus issues and activities.

Whatever the means, keeping volunteers familiar with the institution's vision, mission, and culture is crucial to enhancing their effectiveness and helping them make the most of their roles. Thoughtful training, useful tools, strong support, and regular, meaningful communications from decision makers can help keep volunteers steeped in the life of the institution and forge stronger campus ties. ■

Jennifer J. Salopek is a freelance writer in McLean, Virginia.

Informing
volunteers early
and personally
during a
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volunteer
communication
and stewardship.



By HARRIET S. MEYERS

At the McLean School of Maryland, parent volunteers serve as tour guides at open houses held throughout the year, connecting with parents of prospective students and sharing information about their own children's progress. They are an effective, important recruitment tool for the school.


At the Florida Institute of Technology, alumnus and board of trustees member Bino Campanini, an All-American college soccer player in the 1980s, returned to campus a decade after graduating to organize a players' reunion as a fund raiser for the athletics program. The reunion since has become a traditional element of the institution's Sports Hall of Fame banquet each winter.

At Juniata College, volunteers raised \$103 million in the recent "Uncommon Outcomes" campaign, far exceeding the \$70 million goal consultants insisted the college couldn't achieve because of insufficient staff resources. What's more, they did

so at a cost of 8.5 cents per dollar raised—less than half the cost of the previous campaign, which ran from 1990 to 1996 and raised \$36 million.

At these and other independent schools, colleges, and universities, volunteers truly are the lifeblood of advancement operations, allowing fund raisers, alumni relations officers, and communications and marketing professionals to achieve goals that otherwise might be impossible. In addition to offering extra hands, volunteers bring intangible benefits such as professional expertise, credibility, loyalty, and personal contacts to advancement practitioners who understand how to manage them effectively.

"The typical advancement office has a finite number of staff members available to handle an infinite number of activities," says John Hille, Juniata's vice president for advancement and marketing. Volunteers shift the balance, he adds, offering increased



Volunteers help
campuses in
countless ways

Fleet of Feet

skill sets, diversity, and greater geographic outreach to advancement efforts. “They also can relate to a need or experience they share with a potential donor in ways no advancement professional can,” he adds.

“We are much more successful with every project we undertake when we have volunteer involvement,” says Shelley Greenwood, vice president of institutional advancement at the Latin School of Chicago. She cites the school’s Live & Learn adult education program as an example.

Established in 1971, the Live & Learn program serves more than 6,000 adult students in the greater Chicago area. Each year, 150 volunteers help school leaders design the program’s 700-plus courses, recruit instructors, distribute catalogs, and teach and monitor classes. They even volunteer their homes for cooking and wine-tasting classes.

“The Live & Learn program began with

a couple of parents handing out fliers, and today, it nets well over \$100,000 annually,” Greenwood says. “Another 200 volunteers helped run an auction that raised \$1.3 million for the school in 2004. We couldn’t possibly pull off these activities without our volunteers.”

SMALL STARTS, BIG RESULTS

According to the U.S. Bureau of Labor Statistics, about 64.5 million people—nearly 29 percent of the U.S. population age 16 and over—volunteered at least once from September 2003 to September 2004. During this period, a quarter of all men and one-third of all women volunteered, as did about four of every 10 parents who have children age 17 and younger. They spent a median of 52 hours volunteering, working primarily for religious or education (and most often youth-oriented) organizations.

Advancement officers who work regularly

with volunteers say individuals often prefer to make small contributions at first rather than commit to projects that might require more time and effort than they are prepared to give. “Whenever we speak to a group of alumni, we ask them to give just five hours each year,” Hille says. “Everyone says yes to our request because the commitment is so small. But once they become involved, they tend to stay involved.” What’s more, their level of involvement tends to increase over time.

Seven years ago, Juniata had approximately 400 parent, alumni, and community volunteers, although Hille says most were volunteers “only in intention and never were called on to provide the five or more hours of service that marks Juniata’s current standard for counting volunteers.” Today, the college has nearly 1,700 active volunteers who lend their time and talents to various campus-related activities.

Volunteer Profile

PHOTO NOT
AVAILABLE

VERNELL LEWIS

Volunteers for: Calvert School in Baltimore, where she is the parent of a current student

How do you help? I went into the office of my daughter's school on her first day and offered my assistance. Soon after that I was asked to help with a mailing, and for the past three years, I've volunteered on a regular basis. I take the bus with her to school and volunteer while she's in classes.

I spend an average of 10 hours each week on development work. I send out mailings, do paper-work, file, and perform other office tasks. Outside of school volunteering, I represent my neighborhood on a planning committee and work for a food pantry at my church.

Why do you volunteer? I want to be involved in my child's education. Volunteering gives me a good chance to get to know the teachers and staff and have access to administrators. I also believe in giving something back to the school that is giving so much to my daughter, who is a scholarship student.

What support do you receive from the institution? By volunteering, I'm kept informed of what's going on at the school [in regard to] events and activities in which my daughter is involved.

What about volunteering do you find most enjoyable? I feel like I'm doing something that makes a difference. I especially like to be involved and stay informed. Volunteering makes me feel better about myself. —HSM

WHAT VOLUNTEERS BRING TO THE TABLE

Every volunteer is different, of course, but advancement officers say volunteers typically offer these benefits to the institutions they serve:

Continuity. Alumni volunteers in particular are uniquely qualified to keep the institutional story alive because they share in its history. "Our school is more than 100 years old," says Catherine McClain, director of development for the Asheville School. "Volunteers from classes of years ago have handed down multigenerational contacts that connect us to our past and provide continuity as we move forward. For example, we recently honored a class representative who has served in that capacity for 50 years. He is celebrating his 50-year reunion this year, and his 'swan song' as class rep is to shepherd a 50th reunion class gift."

McClain says Asheville—like many institutions—has countless stories like this one. "Our current chairman of the board is a third-generation Asheville School alumnus," she says. "His father

and grandfather also served in that capacity, and in May, he will hand his graduating daughter her diploma. Three- and four-generation families bring an instant credibility when they meet with alumni because their family history is well documented within the institution.

"Volunteer continuity also helps foster the sense of community that is a hallmark of our school," she adds. "Someone always knows your name or your family."

Good public relations. Volunteers devote their time and energy to causes and organizations that matter to them. If a volunteer cares enough about an institution to spend time helping its paid staff achieve certain goals, then that volunteer is conveying to others that the institution is valuable and worth supporting. Through their work, volunteers motivate and recruit other volunteers, stimulate community awareness of the institutions for which they volunteer, and enhance campus culture by bringing a wide range of experience and enthusiasm for service

in short

A YEAR LIKE NO OTHER. To signal a nationwide commitment to volunteerism, British Chancellor Gordon Brown declared 2005 the "Year of the Volunteer." The 12-month initiative is being coordinated by the government's Home Office, which promotes active citizenship, and well-known volunteering organizations CSV and the Volunteering England Consortium. It aims to increase the numbers of volunteers and opportunities in the United Kingdom, thank volunteers for their dedication, and raise the profile of their work. The companion "Give a Billion Minutes" campaign hopes "to raise a billion minutes of volunteered time for good causes" by year's end. To learn more, go to www.yearofthevolunteer.org.

VOLUNTARIUS MAXIMUS. The Latin School of Chicago's Live & Learn adult education program, featured in the article above, is a prime example of the great things campuses can accomplish when supporters mobilize for a common cause. Sixty percent of the program's instructors are unpaid volunteers who share with students their expertise in the arts, languages, technology, and other subject areas. Many even propose their own course topics. (Profiled volunteer Judy Carmack York will present "How to Become an Expert Volunteer" on Nov. 9.) For more information about the program, go to www.latin.put.k12.il.us/liveandlearn or contact Lynne Wellen, Live & Learn program coordinator, at (312) 582-6035 or lwellen@latinschool.org.

to students, faculty, and staff. They also set a positive example for students and other constituents by demonstrating the value of service and commitment.

“Melbourne, Florida, is home to a large retirement community where

possess skills staff members might not have. Because the Asheville School’s student body is so diverse, school leaders on more than one occasion have asked student volunteers to help them communicate with constituents who

Alumni volunteers in particular are uniquely qualified to keep the institutional story alive because they share in its history.

people with years of professional experience are looking for activities to get involved in,” says Thomas Fox, senior vice president for advancement at Florida Tech. “There are people here with 30 years’ experience in corporate management, fund raising, science, and other areas of expertise,” he adds. “They become our extended public relations staff by talking about Florida Tech’s activities with their friends and by increasing awareness of our institution.”

Unique skills. Volunteers frequently

speak languages other than English. “Our student body represents 13 countries,” McClain explains, “so we ask our student volunteers to translate school news and solicitation letters for us.”

The reward for these efforts: “We often receive gifts from people we might not otherwise have been able to reach,” she says.

Peer-to-peer outreach. As Fox rightly notes, fund raising is much more powerful when solicitation calls come from peers. “They can swap stories of shared experiences and make

Volunteer Profile

JUDI WILLIAM

Volunteers for: Florida Institute of Technology



How do you help? I was restoring our house and working with architects, and eventually the wallpaper designer led me to the textile design program at Florida Tech. I read a newspaper article about an event being planned to raise funds for the program, so I called the development office to offer my help.

I started out by taking refreshments to a planning meeting, and before long, I got very involved. I brought in architects, instructors from other schools, and other professionals from our community to help organize the event. I tracked invitations, arranged seating, and coordinated lots of behind-the-scenes details.

I also am an unofficial ambassador for the campus and help recruit potential students. My husband and I also serve as surrogate parents to new students from out of town.

Why do you volunteer? Florida Tech is growing and is very important to our community. I want to see it grow well. As a member of the community, I’m happy to help in any way I can.

What support do you receive from the institution? I find out what activities [Florida Tech] is planning and what changes leaders are planning to make.

What about volunteering do you find most enjoyable? The fund-raising event we held was the most beautiful event I’ve ever seen, and I was proud to be a part of it. I enjoyed working with the members of our committee, the guests who attended, and the Florida Tech advancement staff.—HSM

A THOUSAND POINTS OF INFORMATION. The Web is teeming with resources written about, by, and for volunteers. VolunteerResource.org features an online bookstore, a marketplace, and a free library of research, case studies, best practices, and white papers. Energize Inc.’s Web site (energizeinc.com) includes a “Volunteerism Bibliography” (energizeinc.com/download/VolBibl.pdf) of 3,146 volunteerism-related resources. The bibliography was assembled by Steve McCurley, author of *Dealing with Problem Volunteers* and a source in the article on page 16. And OzVPM, an Australasian Web site for volunteer program managers, recently featured a “Hot Topic” column in which OzVPM director Andy Fryar asks if it’s time to redefine volunteering (www.ozvpm.com/pasthottopics/july05.htm).

PASSION PLAY. Kin Takahashi made a difference in the lives of thousands and, in turn, became a Maryville College icon. As an undergraduate in the late 1880s, Takahashi recruited Maryville’s first football team, organized self-help projects for underprivileged students, and spearheaded the development of Bartlett Hall, the nation’s first campus-based YMCA. Every summer, Maryville celebrates Takahashi’s efforts to better the college with “Kin Takahashi Week,” a five-day period in which alumni, parents, and friends return to campus to work on various improvement projects. This year, more than 90 volunteers devoted 2,700 work hours to 40 different projects. To learn more, go to www.maryvillecollege.edu/alumni/kin-takahashi/index.asp.

special connections," he says. "People also are impressed that our volunteer callers think the cause is important enough to dedicate their own time and, often, their own money."

Personal and professional contacts.

Volunteers often are connected to a wealth of resources in their communities and can better make a case to constituents that advancement staff might have trouble reaching.

Fox cites the evolution of Florida Tech's public radio station as an example of the power of volunteer leadership. "WFIT was the first radio station in Brevard County to go digital," he says. "One of our volunteers arranged a \$25,000 gift that helped make that possible. He provided access to a corporate donor that we otherwise might not have had."

Volunteers devote their time and energy to causes and organizations that matter to them.

Strength in numbers. "Our alumni volunteers communicate with their classmates, organize reunions, and bring people back to our school," says Elizabeth Bridgers, director of communications and constituency relations for the Asheville School. "We couldn't possibly stay in touch with 3,000 people on a personal level without them."

WHAT THEY DO

Some volunteers prefer to participate in small ways, whereas others seek responsibilities that require major time commitments. According to Florida Tech's Fox, the projects they tackle really are limited only by the imagination and

supervisory time of the advancement staff who must guide them. "It's fun to watch volunteers get invested in what you are trying to achieve," he says. "Their potential truly is unlimited."

Behind-the-scenes volunteers might perform tasks such as data entry or envelope stuffing and addressing. Others make solicitation and thank-you calls, conduct campus tours, and mentor students. Still others take on far more visible roles, serving as trustees and board members, chairing annual fund and capital campaigns, presiding over the alumni council, or participating as strategic planners and advisers.

Mary Anne Paul has been an Asheville School trustee for five years. In addition to volunteering for parent association activities and phonathons, she helps development office staff

members do everything from drafting annual fund appeal letters and contacting prospective donors to sorting call sheets and stuffing envelopes.

"My role as a volunteer is to be an advocate for Asheville School," she says. "Whether asking for an annual fund contribution, decorating a locker room, or talking to a group of parents, I can speak directly about the positive impact Asheville has had on the lives of our students. Together with other parents, I contribute to the critical mass of volunteers that enables the school to meet its annual goals.

"By doing the easier tasks," she continues, "I'm helping free up the staff to

Volunteer Profile

JUDY CARMACK YORK

Volunteers for: Latin School of Chicago, where she is a senior trustee and parent of three former students



How do you help? My volunteer days started with a bang back in 1977. Before my oldest child was even enrolled, my friends were organizing the Latin School's adult education program, and they asked me to write the catalog. I also helped teach and monitor some of the adult education classes.

That was the start of my volunteering at the Latin School, and I never stopped. I was president of the Parents' Council, took charge of the thrift shop, co-chaired the capital campaign for two years, made calls for phonathons, handed out fliers for adult education classes, chaired the auction, worked in the library, served lunch, and now I'm doing strategic planning.

Why do you volunteer? I believe in the mission of the school and the contribution it makes to developing lifelong leaders. I like having the opportunity to work closely with the faculty and staff. And my children loved to see me volunteering at their school.

What support do you receive from the institution? The Latin School is very generous in the variety of volunteer activities it offers, and its staff members provide excellent orientation and training for volunteers and board members. When I was chair of the board of trustees, I met weekly with the head of school to stay informed of school activities.

Since I began volunteering, I have worked with six different heads of school, including two interim heads, and each has ensured that the volunteer's role is supported and encouraged.

What about volunteering do you find most enjoyable? Even though it has been seven years since my children attended, I still enjoy being connected with the Latin School and working with like-minded souls for a good cause. Volunteers tend to get so much more out of helping than the people they serve. When I'm asked to share my abilities and my time, I'm thrilled. My tombstone will say: "She loved to volunteer." —HSM



Volunteer Profile

JOEL RANCK

Volunteers for: Juniata College, where he is president of the Juniata Alumni Council

How do you help? The Alumni Council focuses on helping current students navigate their career paths and providing support for alumni who want to network, retool, or change jobs. We also bring alumni back to campus to teach classes in their field, give advice to students, and participate in career day. Our connection to students is very strong and effective. I also serve as a mentor.

Like a lot of volunteers, I got my first taste at the local level when I started an alumni chapter in Washington, DC. I was disappointed that initially I did not attract many potential leaders until I realized that just a few people can constitute an effective organizing committee. Over time, we developed a core group of leaders and continue to attract new leaders and participants.

Why do you volunteer? It's really quite simple: I like the college. I feel a debt of gratitude to Juniata for giving me the confidence to do the things I want to do and the training to be a thinker and achiever.

What support do you receive from the institution? My expectation is that the institution staff will support us if we contribute our time. Volunteering is a two-way street. The college sets goals, and we contribute our skills to help reach those goals, but the alumni council has its own goals as well. Sometimes our goals overlap and other times they are different. Still, our council has a great relationship with the professional staff. We are not afraid to voice our opinions, and we know those opinions will be considered.

What about volunteering do you find most enjoyable? I have a great time working with others who like the college. I tell someone who is considering whether to volunteer, "If you feel great about Juniata College and you are willing to make the commitment to focus a couple of hours a week on an activity, then you can have a great experience." —HSM

work on bigger issues. At the same time, I'm working with great parents and building a strong community of people who both understand and support the school's mission."

Mimi Tygier and her husband Robert chaired the McLean School's

the campus community, want access to information or people, or are grateful for the opportunities their education enabled.

"It is human nature for parents to want to have a connection with the institutions that are educating their



Parent volunteers agree that volunteering is a great way for them to stay involved in their children's lives without infringing upon them.

annual fund for the past two years. "It was a collaborative effort with the development staff," she says. "Because our son had attended the school for several years, we knew most of the parents and had a good idea of who might be most successful, so I recruited volunteers. I also helped train the volunteers using the materials the school's staff provided."

WHO'S DOING IT AND WHY

Alumni and parents of current students tend to be an institution's most active volunteers, although advancement practitioners say their volunteer corps consists of other constituents, too, including parents of former students, former campus CEOs, former faculty and staff members, community members, and even current students. Anecdotally, they say volunteers tend to be motivated to support a particular institution because they believe in its mission, wish to connect with others and

children," Greenwood says. "Volunteering gives them a way to channel their energy and enthusiasm effectively."

Parent volunteers agree that volunteering is a great way for them to stay involved in their children's lives without infringing upon them. "By the time your kids get to high school, they don't want to see you on their turf, so I looked for ways I could volunteer behind the scenes," says Asheville trustee Paul. "That led to soliciting annual fund gifts and making thank-you calls on behalf of the development office."

Tygier agrees. "I believe so strongly in the McLean School and what it does for the children," she says. "I enjoy the connection I have with the school community through my volunteering, and I get great satisfaction from knowing I have made a difference."

In still other cases, volunteers decide they want to give something back to their alma mater. "I didn't realize how

fortunate I was to go to the Asheville School until many years later," says Joseph Lindner Jr., a 1947 graduate. "I decided to get involved so I could help the school maintain its high quality and make an investment in students and the future of our country."

CARE AND FEEDING

Campus officials who rely heavily on volunteers to achieve big goals agree they bring countless rewards, but they warn that those rewards come at some cost. Staff members who supervise volunteers must be able to manage personality conflicts, take the time to discern each volunteer's strengths and match those abilities with suitable tasks, and be prepared to "fire" volunteers who are underperforming, or worse, damaging the institution's reputation. (For more on addressing volunteer challenges, see "Sticky Business" on page 16.)

"I would not advise taking on volunteers and expecting to turn them loose without guidance," Fox says. Greenwood agrees. "Volunteers expect to see that we have thought through the process," she says, and that means providing them with written job descriptions and a detailed manual of procedures so they know what to expect and what's expected of them. "Volunteers feel more confident if there is a system in place that supports what they are doing," she says. (For more on volunteer training, see "Culture Club" on page 24.)

Juniata takes its volunteer support efforts one step further. "We visit every major volunteer leader in his or her community within a three-year period,"

Hille says. "These efforts not only strengthen our staff-volunteer relationships, they also allow us to explore other opportunities for involvement. Although it's a costly way to communicate, it's the best way to make volunteers feel important and appreciated."

Volunteers agree that these extra touches can make a difference. "Having a good volunteer experience depends on the institution's leadership," Lindner says. "When I was chairman of the [Asheville School] board of visitors, I met regularly with the head of school. He and I shared a vision for continued excellence in [the qualities] that define Asheville School: character, knowledge, community, civility, and friendship. Helping other alumni and faculty develop students who are prepared for college and living and working in a global society continues to be rewarding."

No matter what role a volunteer fulfills, it's important to acknowledge the value of his or her contribution. "So many volunteers minimize their importance to the school," says Chris Fusco, former director of development at the McLean School, now director of development at the Canterbury School in Fort Myers, Fla. "That's why [McLean] holds small receptions with the head of school and invites all volunteers to participate. [Development staff members] want to make sure they know how much they are contributing.

"Volunteers require significant staff guidance," he adds, "but the effort is definitely worthwhile. They make special things happen." ■

Harriet S. Meyers is a Columbia, Maryland-based freelance writer.

Volunteer Profile

ADAM LINSENBARDT

Volunteers for: Florida Institute of Technology, where he is a senior and president of the Florida Tech Student Ambassadors



How do you help? The Student Ambassadors organization supports fund-raising events, gives tours to prospective students and their parents, and hosts open houses. As president, I recruit other students to volunteer for special events. For example, [Florida Tech] recently held a fund-raising fashion show. I organized a team of student ambassadors to be hosts and to provide a shuttle service to participants and visitors.

I also volunteer with the Protestant Campus Ministry in our community. Last fall after the hurricanes, I helped elderly residents clean up their homes.

Why do you volunteer? I want to help the university reach its goals. I like to assist fund raisers and contribute to special events. And I want to let others know what a good place this is to go to school.

What support do you receive from the institution? Students must apply to be ambassadors. I expect the other ambassadors to select people who will be good representatives of the campus and who are committed to giving their time. We also need and receive very good support, including advice and contacts, from the alumni office.

What about volunteering do you find most enjoyable? I especially like working with others and helping people whenever I can. I enjoy representing the university to our visitors—especially prospective students—and answering their questions. I try to be open and enthusiastic and let them know about the advantages we offer.—HSM