



**Volunteer Management
Made Easy Series:**

**Everything You Need To Do
Before You Begin To Recruit**

**Jim Bottorf
Judy Bottorf
Maggie King**

RESEARCH

The *Volunteer Management made Easy*
Series is dedicated to all of the hardworking,
underpaid and underappreciated Volunteer
Managers (Coordinators, Administrators,
Directors, etc.) who toil in the belief that
what they do is a *professional* occupation
that makes a difference in our society.

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Published by PROVOL,
1055 W. Guadalupe, Suite 252,
Mesa, Az 85210.

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**PROVOL, Mesa, AZ
1994**

Foreword

Volunteerism and volunteer management are undergoing rapid and far-reaching changes as we approach the 21st Century. We are advised to "change the paradigm:" the way we perceive volunteers, and the way we act based on that perception. It is clear that yesterday's volunteer management methods are inappropriate for successfully meeting tomorrow's challenges.

More and more volunteers are drawn from the ranks of full-time workers, men are volunteering in record numbers, youth volunteerism is at an all-time high and will increase even more dramatically as secondary schools and colleges respond to the opportunities presented in the National and Community Service Trust Act. Moreover, it is now recognized that an effective volunteer program must reflect an agency-wide philosophy and commitment to the mission of volunteerism.

In addition, volunteers must be perceived as unpaid employees within our agencies, with many of the same rights and responsibilities of paid staff. This necessarily entails a change in the way we have traditionally viewed volunteer roles. Now, it is becoming ever more obvious that volunteers should be integrated into the core of our agencies. This means involving them in program planning as well as implementation of assigned duties. In any case, volunteer managers will be required to adapt their programs and ways of thinking to meet these changes, and many other changes that will become evident in the near future.

In this new series of booklets by PROVOL, *Volunteer Management Made Easy*, we offer practical information for volunteer managers to create and maintain effective volunteer programs that are responsive to today's demands and also meet the challenges of tomorrow. The first booklet, *Everything You Need To Do Before You Begin To Recruit*, is the beginning of a four step process in basic volunteer management which we have labeled the "4R's:" Research, Recruit, Retain, Recognize. There is a booklet for each of these. Other publications in the series go beyond the basics to include a variety of specific volunteer management concerns.

In the *Volunteer Management Made Easy Series*, we offer a program of action that will result in the establishment of a team working to meet the goals and objectives of your agencies, and to provide the valuable community services for which those agencies were created. This team will consist of you, the volunteer manager, administration and staff, volunteers, and the ultimate consumers of agency services.

By providing a practical method for creating and maintaining successful programs, we believe that the *Volunteer Management Made Easy Series* will enable volunteer managers to meet staff, volunteer, and community needs in a timely, effective, and enduring fashion.

Jim Bottorf
Judy Bottorf
Maggie King

Prologue: Volunteers and Dreams

"Man's reach should exceed his grasp, or what's a heaven for?"
Ralph Waldo Emerson

We live in a world that is limited only by our capacity to dream. We define that world by our ability to look beyond the immediate needs of today to the needs of tomorrow, and other tomorrows far removed. Without dreams and aspirations, hopes and expectations for a brighter future, it becomes a bleak and sterile world indeed.

Our small children give us many examples of the power of dreams. Their lives are filled with expectancy, and they find dreams in simply flying a kite or watching clouds glide by. For them, a large, empty box is filled with all the joys of imagination and discovery, and each discovery leads to others beyond imagination. Some would say that, as these children mature, the wonderful powers of dreaming and imagining fall by the wayside as harsh realities intrude. Perhaps that is the case for some, but not for most.

When an elderly woman plants a tree that will spread its shade for others after she is gone, she is making our world a little more beautiful because she has a vision that extends beyond the restrictions of her age. When someone is involved in feeding the homeless, for example, that person does so in the absence of any material gain. This is the essence of a dream in action.

We need our dreams. They enrich our lives in innumerable ways. They may seem to be extremely fragile but, without them, our daily endeavors are little more than empty gestures filling up our time until we die.

There are "naysayers" for whom our lives are "nasty, brutish, and short," in the words of Thomas Hobbes. Everywhere it seems that the world is bent on stamping out dreams and dreamers both. Unimaginable poverty, hunger, disease, and genocide continue to stalk the so-called third world. In the "developed world," crime, random violence, homelessness, the maldistribution of goods and services, political expediency, apathy, and a sense of futility all seem to mock our best efforts and limit what we can accomplish.

None can doubt that there is much wrong with the world today. We could fill many volumes just cataloguing the incredible variety of social ills. But, there is also much right with the world. And this is not a hopelessly naive observation. It remains undeniably true that, in spite of all that impels us along the narrow channels of doubt, we continue to sail on the broad ocean of a brighter future and a better tomorrow. How can we know that? Look to our volunteers. They live in the "real" world, but continue to "do" their dreams every day.

For every person who is victimized by random violence, there is someone to comfort the injured, or console the survivors. This person dreams of a time when such senseless violence will be a thing of the past. For every person who suffers the physical and spiritual degradation of poverty and

hunger, there is someone to collect food and clothing, and to provide shelter for those in need. For every person dying from a treatable disease, there is someone distributing medicine and providing knowledge about personal and social hygiene.

For every abused child, there is someone who is outraged at this defilement of youthful innocence, and who is determined to end the conditions of abuse. For every person injured by racial, ethnic, or gender prejudice, there is someone who is profoundly offended by the insensitivity of some toward others. They want to do their part to end this spiritual violence.

Look what happens every time there is a major flood, a hurricane, or an earthquake. The outpouring of support and help for the victims is staggering. And this is not something that happens by accident. For every misfortune that confronts us, for every person motivated by greed, for every insensitivity or privation, there is someone with a dream, a dream of making a better world for us and for future generations.

These "naive" visionaries are, of course, our volunteers. More than *90 million* of them in the United States alone, these "dreamers" contributed more than *20 billion hours* of service last year in behalf of their dreams.

And this is where you come in. As managers of volunteer services, you are in a wonderful position to help effectuate the dreams of your friends and neighbors, to breathe life into those dreams in a real and meaningful way. In the truest sense, you are "dream facilitators," bridging the gulf between the generous impulses of potential volunteers and meaningful social action. Since managers of volunteers are dream facilitators, the ultimate purpose of *Everything You Need To Do Before You Begin To Recruit*, is to help you become more effective in translating the dreams and desires of volunteers into specific social realities.

Dreams die hard, and when they do, something of incalculable value has been lost to us all. As volunteer managers, as dream facilitators, you can help to keep these dreams alive and preserve the overwhelming value that volunteers offer to us and our society.

Introduction: In The Beginning

Let's face it, the pressure to recruit new volunteers can be pretty intense. If you're involved in starting up a new program, the pressure may be self-induced; you may feel a need to get as many volunteers on board as quickly as possible to demonstrate your effectiveness or impress your new employers.

Ongoing programs may have to respond to new budgetary restrictions, a redefined agency mission, new program initiatives, special events, increased community demands for service, a new board of directors, or a new executive director. Any or all of these factors can serve as inputs that subject you to tremendous pressure to get those new volunteers in place. So you roll up your sleeves and try to figure out how many you can corral in the shortest period of time. Right?

Wait just a minute! There's a lot of work to be done before that new volunteer walks through the door for the first time. Just what is it that you want that volunteer to do? Where will he or she be placed? Does your budget reflect a commitment to that volunteer's need for space, equipment, training, and reimbursement for personal expenses? Is your screening process adequate to assess the qualifications and agency "fit" of this volunteer? Do you have volunteer request forms and job descriptions? How about orientation and training; are they in place? Do you have any assessment of the likely volunteer and staff relationship?

In short, there is a great deal of preparation required before you begin recruiting, despite the pressures that may be applied. Here, we are required to call a halt, however tactfully that can be done, to allow sufficient time to do everything that has to be done before recruiting begins. And that's why we called this, *Everything You Need to Do Before You Begin to Recruit*.

Performing the necessary research first is the most important structural element relating to the overall success of your program. A failure at this stage of program development almost assures overall program difficulties in the long run.

Even if yours is an ongoing and successful program, you should repeat the following process periodically to make sure that you are still doing everything possible to keep your program as thriving as it can and should be.

Getting the Time You Need

It takes time to do everything that needs to be done for your program to be successful. Unfortunately, time may be a scarce commodity in your agency. All too often, agencies wait until there is a pressing need for new volunteer assistance, then ask their volunteer managers to pull out all the stops and recruit as quickly as possible. Nonetheless, try to convince the powers that be that you will need sufficient time to design the volunteer program before you begin your recruitment effort.

The actual amount of time you need will vary depending upon existing circumstances, but try to get as much lead time as is reasonably possible. If you are starting a brand new volunteer program, then a three month period for the necessary research is a reasonable minimum. If you are adding a new initiative to an existing program, then a month should be sufficient, depending on the scope of the new activity.

What you need to do here is explain to your decision-makers that you are committed to excellence and to the long-term success of the volunteer mission. Point out to your administration all the factors involved in the research process that we talk about here. Be tactful, but emphasize that program success, and the agency's goals and objectives, will depend on what you do at this stage of program development. After you have completed *Everything You Need To Do Before You Begin To Recruit*, you will have a lot more ammunition to use when talking with your administration.

If you are successful in getting the lead time you seek, then treasure it, and use it wisely. In this case, the entire research process is approximated in Figure 1. If you get "shot down" in your request for sufficient lead time, but some compromise has been reached about time, you can still have an excellent and successful program. But it will be more difficult to achieve, especially in the beginning. It means that you will probably have to perform two important elements at the same time: the external survey, and internal survey.

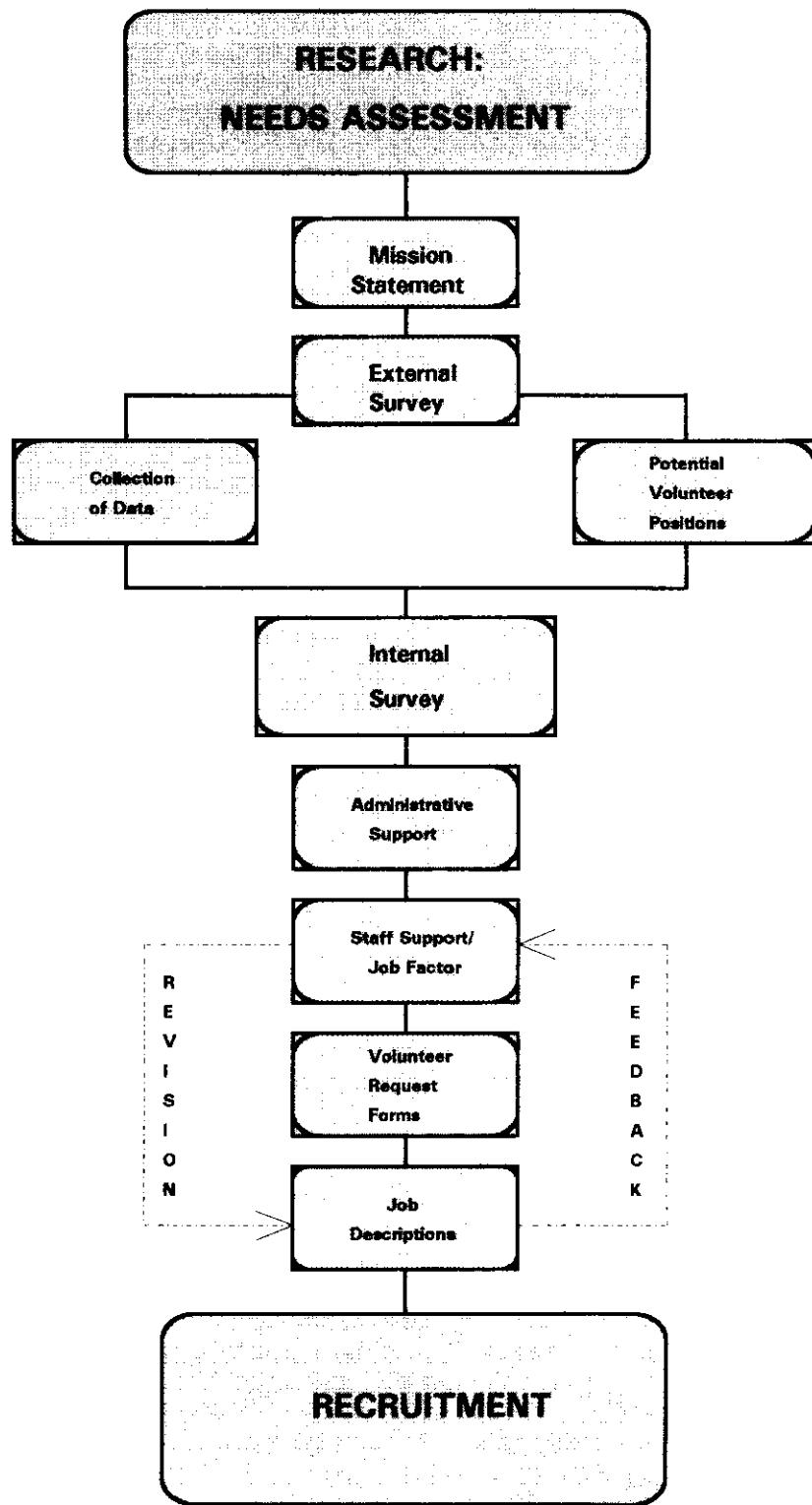


Figure 1: Research/Needs Assessment Process

If you are not successful in securing any lead time at all, then good luck; yours is going to be a continual struggle to keep all the balls in the air that volunteer managers have to juggle. **In many cases, the failure of numerous volunteer programs to live up to administrative expectations is the direct result of inadequate preparation during this critical research phase.**

Defining the Broad Purpose: The Mission Statement

The first step in doing your pre-recruitment research is rather basic, but vitally important; review your organization's mission statement. Know the goals and objectives of your agency as they relate to that mission statement. If your organization does not have an explicit mission statement, and a set of related goals and objectives, then suggest to your administration that this would be a good time to establish them.

Then, being consistent with the organization's general mission, create a mission statement for your volunteer program. Be brief, a mission statement should not be any longer than a sentence or two. It should be the guiding principle for all of your volunteer management activities.

Post your program's mission statement in a prominent place so that you, and any visitors to your office, will see it clearly and easily. That will remind you, and everyone who enters your domain, that you are, indeed, on a mission. If you publish a volunteer program newsletter, or if you contemplate doing so, then include the mission statement in each issue as a constant reminder of what your program is all about.

Perhaps yours is an ongoing program that has been recruiting and managing volunteers for a long time. Nonetheless, review your mission statement. Revise it as necessary to reflect any changes that may have occurred within your organization. And use that mission statement to direct your actions as a volunteer manager.

Remember that your "mission" is your program's reason for being. If you don't have one, or if it is unclear or irrelevant, then your mission will lack focus and direction. Your effectiveness as a volunteer manager will suffer accordingly.

Needs Assessment: Finding Out Where Volunteers Are Really Needed

The pressure to recruit volunteers before the agency is ready to properly utilize them often results in many of the horror stories we have all heard about. When volunteers arrive at their assigned workplaces with no clear idea of the duties to be performed, and staff members scramble to find something for them to do, this does not lead to a positive experience for either the volunteers or for the agencies which recruited them. We cannot overemphasize the fact that volunteers must be recruited for clearly identified needs with specific duties attached. And you haven't yet determined what those needs are.

Needs assessment is a simple process which includes a systematic, patient study undertaken to establish facts and to assess volunteer system needs.

This is a basic process of comparing existing resources with program goals, and then devising a plan to make the most effective use of those resources. It involves a determination of resources currently available to your program, developing program goals and objectives, and then creating a comprehensive plan that will enable you to bridge the gap between program resources and program goals.

You determine where you are with your volunteer program (what you have now), where you want to be with it (what your needs are), and then create a plan to meet those needs.

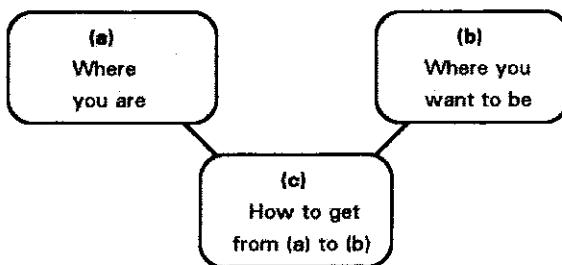


Figure 2: Needs Assessment Overview

External Survey

Contact Other Agencies

The first step in the needs assessment process is to do a survey of agencies similar to your own. Just don't get hung up on the word "survey." It can be a very informal process of getting on the telephone and talking to other volunteer managers to find out what their agencies are doing. Or, you can write a simple request for information from these organizations. If you prefer, you can draft a questionnaire to elicit specific information relevant to your program. For the most part, they will be happy to share their successes and failures with you. Also, use this opportunity to establish cordial relations with them for purposes of networking in the future.

How and Why Do They Recruit

You'll want to find out what jobs they recruit volunteers for, and how they go about recruiting. Would it be appropriate for your agency if you included these volunteer jobs in your program? How do other agencies avoid the problems of strained relations between staff and volunteers? What does their screening process consist of, and how long does it take? See if you can get copies of their volunteer job descriptions and applications. Do they use volunteer request forms to discover perceived needs by staff and administration? What obstacles did they have to overcome when they got their programs up and running?

Get Written Materials

Request any written materials or handbooks that these organizations have developed, or that they have borrowed from elsewhere. In any case, begin a program development file just as soon as you begin talking to others about their programs. This material is not only invaluable during start-up, but also for the future.

Locating Resources

If you are just starting a program, or if you are brand new to the field of volunteer management, it can be a problem just finding out what resources are available, and where, and if other agencies like yours actually exist. Check with the nearest Volunteer Center to find out if they have a directory of volunteer programs in your area. Perhaps your community has a DOVIA

(Directors of Volunteers in Agencies) or similar networking organization. If so, then give them a call and get a list of their member agencies. You'll find out a lot of vital information, and you'll begin to interact with professionals in the field while "picking their brains" in the process.

Process Information

Shortly after you begin the external survey, you're going to find yourself with a lot of information to deal with. Organize this information in a way that best meets your needs. Consistent with your program's mission statement, compile the data that is most pertinent to your organization's goals and objectives. Develop a list of questions and straightforward facts from the data. These will help you determine your agency's needs. At this point, begin organizing the information by creating a filing system. Develop whatever interim forms you need to organize the data. After the needs assessment process is completed, then you can develop a computerized records management system. By then, you'll have a better idea of what information to include and what to exclude.

Value of Data

The information you acquire from other agencies can be valuable to you in several ways. It can give you an idea of the scope of your activities as a volunteer manager, develop some of the questions you need to ask staff and administration, and provide answers to other questions which will impact your program.

For example, how have other agencies responded to the requirements of the Americans with Disabilities Act (ADA)? How, and under what conditions, are volunteer practices subject to the Fair Labor Standards Act? What impact will the National and Community Service Trust Act have on your program, if any? Answers to these questions and others that will come up during the external survey will give your program a boost right at the beginning when it needs it most.

In short, the external survey can yield a gold mine of useful information for you now and in the future. Why repeat the efforts of others when you don't need to? What you want are the results of their efforts. Then, when others come to you for information, you can be as gracious to them as some have been to you. In the long run, we think you'll find that volunteer



Once you've read this book, you'll want the next one in the series, **How To Find The Ideal Volunteers: Target Your Recruiting**. Just fill out the order form below and send it, along with your check for \$7 (plus \$1 for shipping and handling) to: PROVOL, 1055 W. Guadalupe, Suite 252, Mesa, AZ 85210.

Name _____

Address _____

City _____ State _____ Zip _____

Phone _____

management is a collaborative effort that begins with the external survey.

Meet With Administration

When you have completed the external survey to a reasonable degree, meet with your administration to review your findings. Talk about what you've learned from other agencies that is relevant to your own. Present the potential volunteer positions that you discovered during the survey, and seek support for the overall concept of using volunteers and for including these job functions within your program.

Here you will want to gain support for broad program initiatives rather than for detailed volunteer positions. For example, suppose that your external survey has shown that similar agencies employ volunteers to perform receptionist duties. You would seek administrative support for using volunteers as receptionists, but your organization's specific needs would probably require structuring the position differently. This is something you don't know yet.

Don't Force Volunteers On Staff

The point is to gain administrative support without an edict to staff members that they must use volunteers. You can't force volunteers on staff members without encountering a great deal of resistance and resentment. If this happens, the likely result, in addition to staff resentment, is continual staff/volunteer conflict, volunteer dissatisfaction and rapid turnover, and a general sense of the inappropriateness of using volunteers throughout the agency. The internal survey process will show you how to develop detailed volunteer positions without fostering staff resistance along the way.

Internal Survey

The next step in the overall needs assessment process is to do a survey *within* your agency. Realistically, you can begin this before you have completed the external survey, but you may have to retrace some of your steps. If that is desirable, or necessary,

given the realities of your organization, then by all means begin the internal survey while the external survey is still ongoing.

Administrative Memo

Since you have already met with administration to share the results of the external survey, begin this step by asking your chief administrative officer to circulate a memo throughout the organization to get cooperation from those with whom you will be talking. In fact, it is desirable to have your chief administrator call a general staff meeting to explain your purpose and what you will be doing in the near future.¹ Then start talking with individuals throughout your agency. It doesn't matter whether you know which individuals or departments need, or will use, volunteers at this stage. That's what you're going to find out.

Talk to staff members about what you learned from the external survey. Ask them any questions you might have developed from that survey. Then apply the following "job factor" process.² This is an extremely important step that will help you identify and describe volunteer needs precisely.

Job Factor

The "job factor" is a process of determining your agency's volunteer needs in a way that is not only non-threatening to staff, but actually promotes staff and administrative involvement and support for your program. It is a simple process that asks staff members to analyze their own jobs. The responses you receive will give you a good idea of how your agency perceives its volunteer needs. It will also provide a sound basis for the creation of effective job descriptions as you proceed to develop your program.

This, right here, is the beginning of a positive relationship between staff members and the volunteers you haven't even begun to recruit. The job factor results in a positive staff perception that volunteer use is a direct outgrowth of their own

¹ Susan Ellis, *From the Top Down*, Energize, Phila., PA, 1986., provides a detailed account of the role of administration in volunteer program success.

² Adapted from Dr. Ivan H. Scheier, *Building Staff/Volunteer Relations*, Energize, Phila., PA, 1993. Used with permission of the author and publisher.

actions and needs. This will be a correct perception if you take the time to do the job factor properly.

List Activities

Begin by asking staff members to list all of the activities that they do in a typical week at work. You're not looking for them simply to repeat the responsibilities assigned them in their own job descriptions, but the actual activities they engage in while carrying out those responsibilities. In fact, put it just that way; "Please list everything you do on your job in a typical week, no matter how unimportant it may seem."

Keep the Good Parts

After they have listed their weekly activities, ask staff members to mark a "K" by those parts of their jobs that they really like to do, or that they must do because of policy and procedure. This will show you the elements of staff members' positions that they would not think of delegating to others. These job elements are enjoyable, rewarding, or required. *Do not, under any circumstances, attempt to recruit volunteers for these designated staff activities.*

Things to "Give Away"

Now, ask staff members to place a "G" by those activities that they believe could be done more effectively, or could lead to greater job satisfaction, if they could get someone else to perform them.

This will result in the beginning of a list of potential volunteer positions as perceived by staff. Note that you haven't asked staff members if they want to use volunteers in any way. What you have done is to identify those elements of staff positions that they would like to have others do for them. But, don't yet push for volunteer recruitment. In many cases, staff members have faulty perceptions about volunteers, and you don't want to rush them at this point. Complete the job factor first.

Teamwork Activities

The next step is to have staff members place a "T" beside those activities which they believe could be done more effectively if they could team up with someone else. Many staff positions have elements that are amenable to a teamwork

approach. Some staff functions may not be performed as well as they could be in the absence of someone to team up with. The information you receive here will add to the list of potential volunteer positions within your agency.

Dream List

Finally, ask staff members to make a "dream list." This would be a list of those things that are not currently being done, or are not being done effectively, because staff members lack sufficient time or resources to do them. In short, if staff had unlimited personnel and other resources, what would they do differently in their jobs?

In a nutshell, this is the job factor that you should apply as a part of the overall needs assessment process. Notice that you do not ask staff members how volunteers would be used within your agency; you ask them about their own job activities over the course of a typical week. You ask them what they like and dislike about those jobs, and find out how they would do their jobs differently if more resources were available.

You have already observed how this process differs from the old "such a deal I've got for you" school of thought. On the contrary, you seek out staff members and ask what their needs are. Ultimately, you will recruit volunteers to meet the needs you've identified through this process, needs that staff members have made clear, not needs that you or others perceive. This is an important factor in gaining staff support for the volunteer mission.

Introduce Job Factor at Staff Meetings

We've talked about the job factor and what it can do for you in identifying needs within your agency, but how do you actually go about doing it? Introduce the job factor at group meetings of staff within your agency. If yours is a small agency, perhaps you can meet with all staff members at one session. In larger agencies, scheduling separate meetings with staff members from each department might be more appropriate.

Also, if you have discerned a negative attitude toward using volunteers anywhere in your agency, you will benefit from starting in one department, then allowing your success there to

create opportunities for agency-wide expansion of volunteer positions.

Individual Meetings

At this point you can finally begin talking about volunteers. After you have completed the job factor through group meetings, schedule individual meetings to review your findings with relevant staff members. Probably not all staff members indicated a willingness to delegate ("give away") or share some job functions, so you will not need to do a follow-up with these individuals yet. But, after your volunteer program has proven successful with some staff members, others are likely to ask for volunteers to assist them.

What you are going to do in these individual meetings is review the information that staff members provided with their list of job activities. Talk to them in terms of needs. Say, for example, "You have indicated that you could be more efficient and effective if someone else performed the specific job activities you've listed here. You seem to be saying that you could spend more time on the important and pleasurable aspects of your job if you had some help in doing those things indicated as 'give-aways' or team activities." Now, tell them that you can help by finding a skilled volunteer to provide that assistance. When it's appropriate, point out that other organizations like yours also use volunteers to perform similar activities.

The two key elements to emphasize during these meetings are: (1) the staff member has indicated that his/her job satisfaction would be enhanced if certain needs were met, and (2) that your involvement in the process is to *enable* staff to expand job horizons by helping meet those identified needs through volunteer recruitment. You are not there to get somebody else to do the staff members' jobs, but to help them expand their creative responses to the fulfillment of job responsibilities. You are not going to recruit volunteers to replace current or future staff positions, but to enhance staff capabilities. In short, your role is to provide opportunities for job enrichment through the *applied* use of volunteers.

Beware of Being "Pushy"

One thing to keep in mind during these individual meetings is that you are swimming in potentially shark-infested

waters. Paid staff members tend to react negatively to an outsider coming in and telling them how to do their jobs. Volunteer managers may be seen as outsiders, especially when new volunteer programs are being developed. You want to avoid being perceived as threatening, or demeaning the job skills and talents possessed by the staff member. You need to be clear that the staff member's considerable talents can be applied to the required, important, and pleasurable aspects of the job if you help them meet their needs *identified* through the job factor.

Thus far, we have been talking about those job activities that staff members are willing to delegate or do as part of a team. In fact, you will get most of your identified needs for recruiting volunteers from these job elements. But, don't forget the "dream list." These sort of fall into the category of, "Boy, it would be nice if only" These items will not be the most compelling priorities for recruiting volunteers initially, but talk freely with staff members about them, and keep them in mind as your recruiting proceeds. Who knows, you may find the perfect volunteer to make these dreams realities.

Job Design: Tailoring the Needs

Job design is a process of transforming identified needs into written requests for volunteers that will lead to the development of job descriptions. You already started the job design process when you reviewed the individual job factors with staff members. In each case, a number of needs was identified which, taken together, provide the outline of a potential volunteer position.

Volunteer Request Form

The volunteer request form (Figure 3) allows you to formalize the information sharing process with staff members and is a valuable step in designing volunteer jobs. When you review the job factor with staff members, ask them for tentative job titles, and discuss the general purpose(s) for which volunteers will be recruited. Now, based on the job factor information, you and the staff member can explore potential job duties for volunteers, required qualifications, whether training will be required for the volunteer, what kind of training and who will do

it, and the time commitment that you will ask the volunteer to undertake. (Across the United States, the typical volunteer averages about four hours per week, although there is a wide variation in the volunteer commitment). The Volunteer Request Form is self-explanatory with the exception of the "Approved By" section.

VOLUNTEER REQUEST FORM	
Today's Date	_____
Volunteer Job Title	_____
Requesting Supervisor	_____
Purpose of Job	_____
Description of Duties	_____
Qualifications Required	_____
Training Required	_____
Time Commitment (Days, Hours, Short Term, Long Term, etc.)	_____
Other Comments/Notes	_____
Approved By:	_____
©PROVOL, 1992	

Figure 3: Volunteer Request Form

It may be that your organization already requires the executive director, or other administrative superior, to "sign-off" on all new volunteers. If so, the form provides a means for having this done. But, even if your agency does not require this, it is a good idea for you to gain approval from administration, regardless. Remember, you want continuing administrative support for your volunteer program even after the initial enthusiasm may have dissipated.

By seeking an administrative sign-off for each volunteer, you provide an ongoing opportunity for your administration to "buy in" to your program. The desired result is for staff (as a

result of the job factor) and administration to look upon volunteers as being "theirs," not yours. Your goal is to foster the perception that volunteers "belong" to your entire agency, not only to the volunteer program that you manage.

Responsibility & Motivation

As we continue the process of moving from the job factor to job design, we must consider the levels of responsibility for the duties to be performed by the volunteer. In addition, we must take into account the primary motivational factor for that volunteer. Both of these elements will help you refine the qualifications you noted on the Volunteer Request Form, and create a job description that will direct your recruiting efforts toward specific volunteer skills.

Responsibility Levels³

After you and the staff members have completed the Volunteer Request Forms, review them carefully, and then determine the level of responsibility for each volunteer position. For example, if a volunteer position is for clerical work, simple filing and sorting, then this would probably require the volunteer to follow relatively strict guidelines and offer little independent decision-making. Given little latitude for decision-making and independent action, this job would most likely be assigned the lowest responsibility level.

On the other hand, if the volunteer position is for someone to plan and coordinate a special event, for example, then it would be appropriate for the volunteer's supervisor to establish general guidelines, but permit the volunteer to exercise broad decision-making powers concerning the conditions of job performance. Place this job at the highest responsibility level. This would be the case especially if the volunteer will be supervising or coordinating other volunteers or even staff. Then, of course, a volunteer position that permits some independent decision-making with moderate supervision would fall in the mid-range of responsibility. Figure 4 shows the levels

³ Marlene Wilson's classic, *The Effective Management of Volunteer Programs*, Volunteer Management Associates, Boulder, CO, 1976, gives an in-depth look at assignment of responsibility levels through a task analysis process.

of responsibility and the general guidelines to use when evaluating potential jobs.

Repeat this process for each potential volunteer position. Then group them by responsibility category. The likelihood is that you will have just a few volunteer positions in the "high" category, with the majority in the "medium" and "low" categories. As you can see, this process will help you determine some of the personal skills you will look for in volunteers for these respective positions. These skills would be in addition to the specific job skills previously identified for each position.

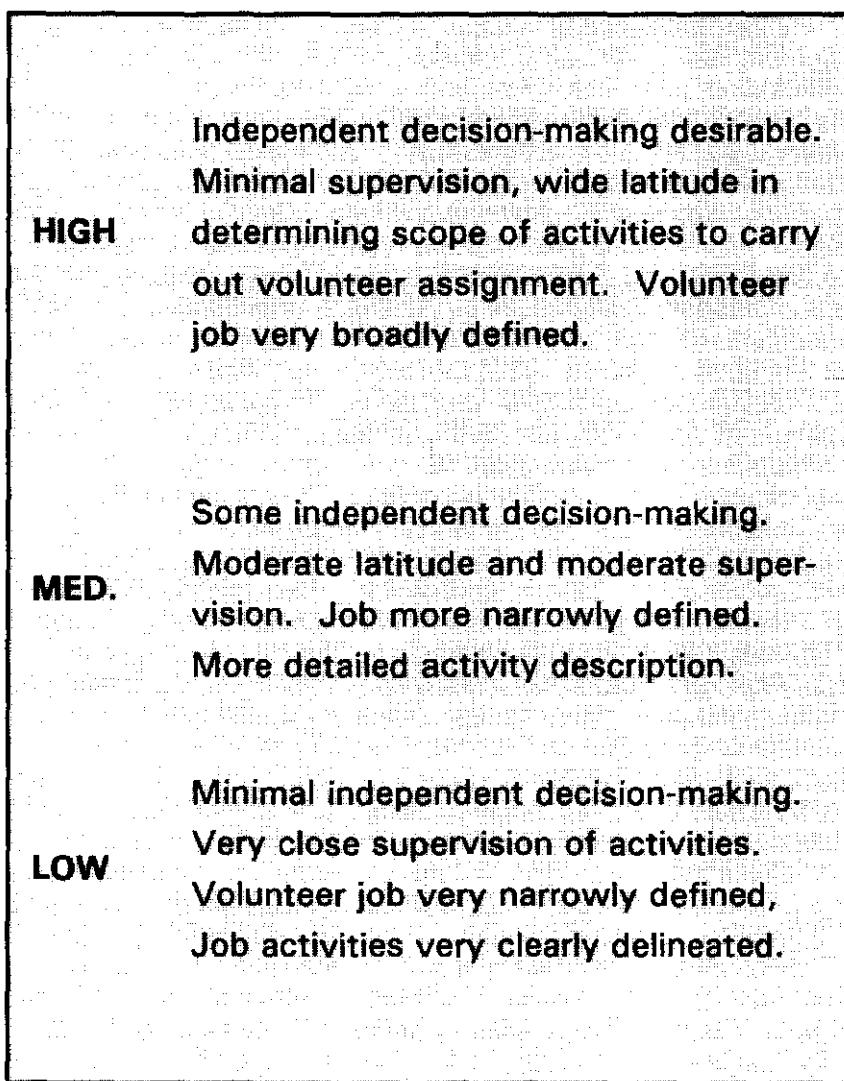


Figure 4: Responsibility Levels

Motivational Factors

In addition to the responsibility levels assigned to each volunteer position, it is also necessary to consider the *general* motivational disposition of each recruit. There are many motivational schemes in management literature, but we have found a simplified one by McClelland and Atkinson to be quite useful.⁴ It is not necessary to complete an entire psychological profile of each volunteer applicant. Rather, you will be looking for broad personal motivating factors to assist you in placing volunteers to achieve the "best fit" for your organizational needs.

McClelland and Atkinson have identified three broad motivating forces: *power*, *achievement*, and *affiliation*. These are not totally separate and distinct categories, but overlap to varying degrees. Few individuals, for example, are entirely motivated by power and have no achievement or affiliation needs. Nonetheless, one of these factors is likely to predominate, and that is what you will want to find out during the screening process. You needn't administer a psychological test to determine the predominant motivator. That can be determined from the information on the volunteer application, and from the screening interview.

Power

Individuals who are motivated predominantly by power factors are likely to be most comfortable in leadership roles where they can make decisions about how to fulfill their volunteer responsibilities. They chafe under close supervision and view themselves as capable of independent work.

These persons typically would make good committee chairpersons, would be found in charge of a special event, and would be highly committed volunteers if they had authority and independence commensurate with their responsibilities. If you anticipate situations in which some volunteers will be supervising other volunteers, then "power persons" with good interpersonal skills would be ideal for these positions.

⁴ Adapted from David McClelland and John Atkinson, in George Litwin and Robert Stringer, *Motivation and Organizational Climate*. Harvard University Press, Cambridge, MA, 1968.

Achievement

Achievement-motivated individuals are task-oriented. They work well by themselves in situations where clear progress can be demonstrated. Give them a job to do, explain how you want it done, then stand back, because these individuals want to get down to work as quickly as possible. Don't place these persons in volunteer positions where they will have little to do. They will likely consider their activity a waste of time and, eventually, become dissatisfied with their volunteer experience. But, on the other hand, this doesn't mean that they will be content with "busywork" either. Achievement-motivated individuals, like all volunteers, need to feel that what they are doing is valuable to your organization. For these individuals, regular feedback about job performance is necessary to show the relationship between their activities and demonstrable results.

Affiliation

Individuals who are motivated by a need to affiliate with others are most happy in situations that have a strong social component. When close interaction with others is a basic element of volunteer positions, then "affiliators" would be the ideal candidates for these jobs. When you identified specific needs through the job factor for receptionist duties, serving on committees, or any other activity that involves working closely with others, you also identified potential volunteer positions for affiliation-oriented individuals. Placing these individuals in positions in which some form of social interaction is not possible will lead to a group of dissatisfied volunteers.

Placement

It's probably clear to you by now that there is a close connection between the levels of responsibility, the motivational factors, and a good volunteer "fit" within your agency. This is not to make judgments about the value of individuals personally, or about their relative worth to your agency. To be successful in the long run, your program will need talented individuals at each level of responsibility who are placed in the appropriate positions relative to their motivational needs. The importance of classifying volunteer positions by responsibility levels and by the motivators is to insure that you properly place your volunteers in positions that meet the needs of your organization *and* the needs of your volunteers. By doing this, before you have even begun to

to recruit, you will have taken a giant step toward positive staff/volunteer relations, and toward retaining the volunteers that you will recruit. See the "Brief Case Study" at the end of this booklet to see how applying the motivators properly can work for you.

Job Descriptions

Now that you have reviewed the Volunteer Request Forms that you received from staff members, consult with them to determine the level of responsibility appropriate to each volunteer position. Then include the relevant motivational factor in the qualifications section of the job description. Figure 5 is an example of a job description worksheet that might be useful for you.

Job Description Worksheet

Figure 5: Job Description Worksheet

The job title was already determined when you consulted with staff members concerning the volunteer requests. The person who the volunteer will be "accountable to" is the staff member who will be supervising that volunteer. This is the same staff member whose job factor identified the specific needs which led to the creation of the volunteer position. Complete a job description for each volunteer request that you received from staff members. When this has been done, you will finally be ready to begin recruiting those wonderful volunteers to fill the needs you've identified -- almost.

Feedback/Revision

One final step remains before you can begin to plan your recruiting campaign. That's to make sure your job descriptions accurately reflect the information provided on the volunteer requests. So, take your completed job descriptions back to the staff members who completed volunteer request forms. Ask them to review the job descriptions to insure that you completely understood staff needs. They will not only appreciate the feedback, but they will continue to feel that they are an integral part of the volunteer selection process. Then make any revisions to the job descriptions that may be necessary.

Now you are ready to "roll up your sleeves" and begin recruiting skilled, dedicated members of your community as volunteers for your organization.

Summary & Conclusions

We began our discussion with the title, *Everything You Need To Do Before You Begin To Recruit*. That comprised a review of your agency's mission statement and the creation of a mission statement for your volunteer program. The next step was an external survey of organizations like yours which would result in the collection of significant information, and a list of some potential volunteer positions. Following that was the internal survey during which you applied the job factor. This yielded information about specific needs within your agency as perceived by staff and administration and, with the levels of responsibility and the motivational factors determined, led to the creation of a

set of job descriptions. These job descriptions were then reviewed by staff, and necessary revisions were made.

This is a fairly comprehensive process that can pay significant dividends to you and your agency, now and in the future. The process whereby you determined agency needs encourages staff members to "buy in" to your volunteer program, and fosters the correct perception that volunteers can *enhance* individual and agency capabilities. This will go a long way toward the resolution of potential conflict between employees and the volunteers you recruit to assist them. Also, when you recruit volunteers on the basis of identified needs, you help assure a good fit between the volunteers and the agency. This further reduces the potential for negative staff/volunteer relations.

Another payoff that results from doing everything you need to do before recruiting is that you increase the probability that the volunteers you do recruit will remain with your agency for an extended period of time. In short, you will avoid some of the problems that many agencies have with volunteer retention. An additional benefit, for you, is that your volunteer program will be regarded as a *professional* component of your organization. And that is worth striving for.

And, finally, you will do your volunteers a real service by recruiting them to achieve a match between their skills and your agency's needs. You will facilitate and make it possible for each of them to have a meaningful volunteer experience, regardless of the specific nature of their volunteer activities. You will bring together your agency and your community in vital partnerships that effectuate volunteers' dreams for a better tomorrow.

Questions & Answers

Q. The job factor seems to be a lengthy process, and I'm not sure I have the luxury of enough time to do it. Any suggestions?

A. The job factor can be a time-consuming process. But, it will save you a great deal of time when you recruit volunteers, and it will save you even more time by enabling you to avoid rapid volunteer turnover that requires additional recruiting, training, screening, placement, etc. Point out to your administration that "time" is the greatest resource they can provide at this stage, then let them know that program success hinges on proper completion of the entire process.

Q. Well, that's easy for you to say, but I'm the Volunteer Coordinator for a large organization. If I did the job factor as you've suggested, it could be many months before I recruit volunteers. Now what?

A. The solution is not to skip any part of the needs assessment process, but to prioritize it. Talk to your administration about organization priorities. Then do the entire needs assessment process, including the job factor, for only those departments with the highest administratively determined priorities. When your program is established and proven successful in the high-priority departments, move on to others. You will not have to repeat the external survey as your program expands throughout the agency. Also, by beginning your program in a limited way, you can demonstrate to any skeptics in your agency that the volunteer program is a real organizational asset.

Q. My program has been around for a long time, but it just seems to "piddle" along and employees and volunteers don't get along very well. I'm the new Volunteer Administrator. What should I do?

A. Okay, you've "inherited" a program of limited success and you're expected to be a miracle-worker and turn it around in short order. That's pressure. The solution, of course, *is* to perform miracles. In a way, you've got a very good situation; anything you do that improves the program will be regarded positively. So, do the needs assessment. It is not limited to only new programs. In fact, after your volunteer program has achieved the success expected of it, repeat the process periodically to make sure that you are providing as much volunteer assistance as your organization needs.

Q. I've worked hard to recruit really good volunteers, but I can't seem to keep them even though I recognize the "heck" out of them. What do you think I should do?

A. Assuming that you've done the needs assessment, including the job factor, it could very well be that you have not achieved a good fit

between individual volunteers and specific staff needs. Review the responsibility levels and the motivators, then make sure that your volunteers are exercising the proper levels of responsibility in volunteer positions consistent with their power, achievement, or affiliation needs.

Q. I belong to an all-volunteer organization, and I'm supposed to be in charge of volunteer activities *within* the organization. Isn't the whole process you've outlined irrelevant to what I'm supposed to do?

A. No, it's not. Omit the job factor because you have no employees to provide information for specific needs. But do review the mission statement, create one for your in-house volunteer program, see how other organizations are handling volunteer functions, and create a set of job descriptions for your volunteer activities. Then apply the responsibility levels and the motivators. While all-volunteer organizations present some different problems than other organizations, you should not skip the process completely, but apply the relevant components of it to assure long-term success.

Q. Are you telling me that I need to have job descriptions for even episodic volunteers? While we do have a number of long-term volunteers in our agency, we do a lot of special events that require volunteers for only one day. Then we never see them again. Doing the work of creating job descriptions seems like a waste of time to me.

A. Yes. Have you ever seen or heard about a situation in which volunteers show up at the appointed time and place and someone says, "The volunteers are here. Got anything for them to do?" Now that does not inspire confidence that this is to be a meaningful experience for the volunteer relative to something important in your agency. It doesn't matter whether these volunteers are long-term or episodic, the result is the same: a negative volunteer experience that will "sour" these individuals on your agency in the future.

Now, take the special event and break it down into as many functional parts as is reasonable. Be as specific as you can. These functions represent agency needs relative to the special event itself. Then develop a job description for each of these functions. Every volunteer, long or short-term, deserves a clear, written, set of expectations and responsibilities. You can provide this with job descriptions that you give to the volunteers and to the person(s) supervising them during the event. Who knows, these people might be available for your next event.

Q. I've done absolutely everything you've talked about in *Everything You Need To Do Before You Begin To Recruit*. Oh, maybe I had a different name for it, or did it in a slightly different manner, but I've done it all, and more. But I still have a problem of conflict between volunteers and paid staff members. Have any help for me?

A. Perhaps. There are situations where it appears that you've done everything right, but something just doesn't seem to click the way it should. In the present circumstance, it may very well be that staff training is the missing element. Frequently, volunteers are provided to assist staff members who have had no previous supervisory experience. This would lead to the same problem even if the person assisting staff were also a paid employee instead of an unpaid employee (volunteer). Schedule any necessary training in supervising volunteers through the staff member in charge of this function. Or, in the absence of such a staff person, schedule and conduct the training yourself. It's a good idea to provide relevant volunteer management training for all staff members who supervise volunteers.

Q. I'm the Volunteer Coordinator for a municipal government agency. Our agency is unionized. Wouldn't our union representatives get upset if they thought we were bringing in volunteers to replace current staff members and eliminating paid jobs?

A. Yes, they would get upset, and rightfully so. Remember, you are using volunteers to *expand* present capabilities, not to replace them. Current staff should never be made to feel that their jobs are threatened by volunteers. Emphasize to your bargaining unit representatives that these new volunteers will be used to extend the reach of present staff by adding their skills and energies to those of staff members. Include union representatives in discussions with administration and staff about using volunteers, and be sure to get their feedback when you have developed job descriptions. Many agencies throughout the country have successfully introduced volunteer programs with the active support of bargaining units.

Q. I'm a brand new Volunteer Administrator, and I have no prior experience in the field. It's all well and good for you to say, "Do an external survey." But I don't even know what resources are available. What should I do?

A. Valid point. But as we indicated in the text, contact your nearest Volunteer Center. There are more than 450 of them across the U.S. Not only do these Volunteer Centers maintain resources for volunteer managers, they can also point you to other resources. They can tell you about other agencies like yours in the area. Also, get information from them about the Points of Light Foundation, AVA, and the local volunteer management networking group such as DOVIA.

Volunteer Centers and DOVIAS also sponsor or conduct training workshops from time to time. If so, go to as many of these as your budget permits. You can also write to us here at PROVOL (1055 W. Guadalupe, Suite 252, Mesa, AZ 85210), and we'll be happy to talk with you about a consultancy for your program.

Using the Motivators: A Brief Case Study

A few years ago, Judy Bottorf, the Volunteer Coordinator for the Tempe, Arizona, Police Department, was recruiting to fill a volunteer position in the department's Criminal Investigation Division.

The position involved updating of records and catching up on a filing backlog. The prospective volunteer would work alone with some supervision provided each time the volunteer appeared for his work assignment.

Judy had developed the volunteer position as a result of the job factor and determined that it entailed a medium level of responsibility. It could best be filled by an achievement-oriented individual.

She then began recruiting to fill the position, and, as a result, "Phil" submitted his application. During the interview process, and from a review of his application, it became clear that "Phil" was motivated by an a need to affiliate.

"Phil" was an insurance salesman who had progressed to owning his own agency. But, he had somehow heard about the opening in CID and, laboring under an incorrect perception of how police detectives operated, "Phil" insisted that the job was for him.

Unable to convince him otherwise, and not wanting to lose a very talented and personable volunteer, Judy placed "Phil" in the CID job.

It wasn't long before her misgivings were validated. In only a few weeks, the detectives were complaining that "Phil's"

disruptive nature was keeping them from getting their work done. Moreover, "Phil" wasn't getting his own work done!

Not much more time passed before the detective supervisor showed up at Judy's office to state that "it just isn't working out." "Phil" concurred.

Just what did "Phil" do that was so disruptive? He socialized. He visited the detectives in their offices to pass the time of day. In short, he acted on his need to *affiliate*.

Here was a situation that could have had negative consequences for the volunteer program: a disgruntled supervisor and a dissatisfied volunteer.

Fortunately, Judy was able to rescue the situation. She had an opening for a volunteer to fingerprint citizens who needed to meet state licensing requirements, to obtain a passport, etc. She then reassigned "Phil" to this position and he flourished. Imagine, an insurance salesman with a constant flow of "captives" for him to socialize with. They couldn't walk away with him holding their hands! He could *affiliate*.

Then she placed a definite *achievement-oriented* individual in Criminal Investigations and met the detectives' needs for volunteer assistance. As a consequence, the proper fit between agency needs and volunteer motivation was reestablished. And, what could have been a long-standing conflict between staff and volunteers was avoided.

NEEDS ASSESSMENT CHECKLIST

Mission Statement:

Organization:	In Place/Reviewed?	Need to Create?
Volunteer Prog:	Created?	Posted?

External Survey: Identified Potential Volunteer Jobs? Began Vol. Job Files?

Where Located? _____
Secured other Info. About Programs? Started Files? Where Located? _____

Shared Info w/Administration? Administration Response? _____

Contacted Volunteer Center? Contacted DOVIA? Contacted "Points of Light?"

Internal Survey:

Did Inventory of Resources Available to Vol. Program? Space? Equipment?
Support Services/Location? _____
Listed? Data Filed Where? _____

Administration Met w/Staff to Promote Support for Vol. Program? Issued Memo?
If not, When Scheduled? _____

Administered Job Factor? Entire Agency? Departments? _____

When Other Departments Scheduled? _____

Job Design:

Created Volunteer Request Forms in Conjunction w/Staff? Filed Where? _____

Determined Responsibility Levels for Each Potential Volunteer Position?
Determined Appropriate "Motivator" for Each Volunteer Position?

Created Job Descriptions from Vol. Request Forms? Filed Where? _____

Reviewed Job Descriptions w/Appropriate Staff? Made Necessary Revisions?

Comments: _____

Figure 6: Needs Assessment Checklist

Training & Consulting

PROVOL offers a variety of training and consulting options to help make your volunteer program more effective and professional. We will work directly with you or your agency to develop a program designed to meet your individual needs, or to assist you in improving your existing program. Whether you are a new volunteer coordinator or an experienced professional, we can help you to enhance program capabilities, structure new initiatives, and provide creative solutions to ongoing problems.

PROVOL currently offers workshops and customized training and consultation for non-profit agencies, municipal government units, police departments, military-based volunteer programs, educational institutions, and professional sports franchises. If you feel that your program has specialized needs, we can help you devise a plan to meet those needs. Contact us at PROVOL, 1055 W. Guadalupe, Suite 252, Mesa, AZ 85210 for additional information. Some of our seminar offerings are outlined below.

The "4R's" Seminar Series deals with four vital elements of the volunteer management process. These seminars are designed as free-standing modules that can be presented in half-day workshops, or combined in a package for a one-day or two-day workshop.

Research

- Perform a Professional Needs Assessment
- Build Staff/Volunteer Support
- Gain Administrative Support
- Apply Levels of Responsibility & Motivation
- Write Effective Job Descriptions

Recruit

- Target Recruiting for Maximum Effectiveness
- Develop A Workable Recruitment Plan
- Match Volunteer Skills with Agency needs
- Create a Marketing Plan that Works

Retain

- Initiate Effective Orientation and Training Programs
- Improve Record Keeping
- Foster Positive Volunteer/Staff Relations
- Evaluation as a Part of Retention
- Reassign and Replace Volunteers

Recognize

- Institute Formal and Informal Recognition Plans
- Design Creative Recognition Programs
- Use Evaluations as a Way of Saying,
"Thanks, You're Doing Great!"
- Publish a Volunteer Newsletter
- Being Creative in Day-to-Day Recognition

"Beyond the Basics" Seminars are also designed as modules that can be combined in a variety of ways to meet your needs for advanced volunteer management training. They offer what you have asked, effective training for program maintenance and expansion. Some seminars in this series are outlined here.

Improving Volunteer/Staff Relations

- Develops Concept of Vol. Coordinator as Consultant
- Creates Strategy to Gain Support In Your Agency
- Presents a Step-by-Step Process for Securing Staff Support
- Clarifies Roles and Responsibilities of Staff Members
- Demonstrates Key Elements of Necessary Staff Training

Event/Project Planning

- Projects Big Enough to Matter, Small Enough to Win
- Build Partnerships and Get Community Involvement
- Identify Challenges and Methods for Overcoming Them
- Discover Key Components of Successful Projects/Events
- Establish Goals & Objectives: Simplified Plans that Work

How To Do Almost Anything With Almost Nothing

- Plan Recognition for Maximum Impact at Minimum Cost
- Gain Community Support for Underwriting Your Program
- Locate Resources, Sponsors, In-Kind Contributions
- Develop and Sustain Program/Community Partnerships
- Create Professional Displays at a Fraction of Cost
- Save Money on Printing and Mailing Costs

Marketing & Public Relations

- Develop Professional Newsletters that Attract Attention
- Create High Quality Displays on a Tight Budget
- Develop & Produce Quality Brochures to Sell Your Cause
- Create a Uniform Look for Your Agency's Publications
- Find & Use Marketing Resources Developed by the Pros.

About the Authors

Jim Bottorf has comprehensive experience in volunteer management at the executive level. He has managed, trained, and used episodic volunteers extensively. He currently publishes and edits *Volunteer Administration in Law Enforcement*, has contributed numerous articles to it, and has also written a series of articles on volunteer management for *Arizona Human Services Magazine*. Jim has been a County Commissioner, Chairman of the Board for a 164 bed skilled nursing facility, Executive Director of an economic development agency, Chairman of the Board for a mental health agency, and a Director of a youth correctional facility. He has been a presenter at the local, state, and national levels with more than 20 years involvement with volunteers. He has been a college teacher for over 20 years. Jim received his education at Colorado State, the University of Oregon, Cornell, Penn State, and the University of Colorado.

Judy Bottorf is the Volunteer Coordinator for a metropolitan police department. Her program is acknowledged the finest in Arizona, and has gained national and international recognition. She has received inquiries from all over the United States, including the Capitol police force in Washington, D.C., and from Canada, Australia, and New Zealand. The program has been the subject of articles in four national publications, and her own article appeared in *Police Chief Magazine* in December, 1992. Judy has published in *Volunteer Administration in Law Enforcement*, and has become a recognized expert in the field. She has served on the Board of Directors of an international volunteer organization, and she has presented at the local, state, and national levels. She has been involved in all phases of volunteerism for over 15 years and received her education at Northern Arizona University, and at the University of Colorado.

Maggie King is the Volunteer Coordinator for a large metropolitan high school district. She has been Director of Youth Programs for the Volunteer Center of Maricopa County (Phoenix, AZ) and for the San Diego United Way. She has taught in volunteer management courses at San Diego State University, and she has also served on a Youth Services Subcommittee for the Points of Light Foundation. She has written for *Volunteer Administration in Law Enforcement*. Her expertise in project/event planning and in youth involvement in volunteering are becoming recognized nationally. Maggie and Judy were co-founders of the Prescott (AZ) DOVIA, and served on the task force which created the Volunteer Center there. Maggie has also presented at the local, state, and national levels and has more than 15 years involvement in volunteerism. She received her education at Yavapai College, Arizona State University, and at the University of Colorado.

The Volunteer Management Made Easy Series:

***Everything You Need To Do
Before You Begin To Recruit***

***How To Find The Ideal Volunteers:
Target Your Recruiting***

***Keeping The Volunteers You've
Worked So Hard To Recruit***

***Volunteer Recognition: How To Make
It Work For You***

***How To Do Almost Anything
With Almost Nothing***

***Volunteer/Staff Relations:
Smoothing Out The Rough Spots***

***Interpersonal Skills Development for
Volunteer Coordinators***

***Project & Events Planning:
Getting It Right The First Time***