

# Strategic Volunteer Engagement

*A Guide for Nonprofit and Public Sector Leaders*



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A publication of the  
RGK Center for Philanthropy & Community Service  
The LBJ School of Public Affairs  
The University of Texas at Austin

Date: May, 2009

The development of *Strategic Volunteer Engagement: A Guide for Nonprofit and Public Sector Leaders* was made possible by a grant received from The Volunteer Impact Fund, a collaborative funding initiative of the UPS Foundation managed by The National Human Service Assembly. Advisors to the grant received by Sarah Jane Rehnborg of the University of Texas at Austin were Betty Stallings, Building Better Skills; Susan J. Ellis, Energize, Inc.; Jane Leighty Justis, Leighty Foundation; Jeff Brudney, Cleveland State University; and Jackie Norris (ret.), Metro Volunteers Denver.

The printing of this edition of *Strategic Volunteer Engagement* is made possible by the OneStar Foundation, Austin, Texas.

## Volunteers: A Distinctive Feature of the Nonprofit Sector – A Critical Asset to the Public Sector

### *Preface*

One of the most distinctive features of the nonprofit sector is its voluntary nature. Nonprofits do not coerce people to work within the sector nor do they possess the right to mandate the use of their services (Frumkin, 2002). For nonprofit organizations, “free choice is the coin of the realm. Donors give because they choose to do so. Volunteers work of their own volition” (p. 3).

Clearly, volunteers—an unpaid workforce available to further the goals and to help meet an array of needs in resource-constrained organizations—represent one of the critical competitive advantages of the nonprofit sector. An estimated 80 percent of third sector organizations report engaging volunteers in service capacities (Hager, 2004). Although comparable volunteer data pertaining to the public sector is elusive, we do know that volunteers are heavily engaged in public safety work, K-12 education, cultural arts, social services, and policy development. Furthermore, expanding Congressional appropriations make possible major national service initiatives including AmeriCorps and AmeriCorps VISTA, service-learning programs at all levels of education, and senior service opportunities including RSVP, Foster Grandparents and Senior Companions (Rehnborg, 2005).



Despite the idiosyncratic role of volunteer involvement within the nonprofit and public sectors, remarkably few organizations possess the knowledge to strategically maximize this advantage. Equally few decision-makers understand the basic constructs of volunteer engagement. Many in top leadership positions do not know what they might expect from an engaged volunteer workforce, nor are they aware of the critical importance of an infrastructure designed to facilitate and support community engagement.

While leaders of nonprofit and public sector organizations have grown accustomed to seeing their roles defined in terms of leveraging tight resources, maximizing community engagement, and advancing organizational growth and development, too few have made the connection between those goals and creating an effective system for volunteer en-

agement. Furthermore, misconceptions about volunteer engagement abound. Executives in both sectors fear opening Pandora's box should they misstep with their community engagement strategies. Nonetheless, informed top-level support is critical to maximizing volunteer participation; managing diverse volunteer community interests and resources; facilitating productive relations among staff, volunteers, and clients; protecting against volunteer-related liabilities; and ensuring that voluntary labor connects with the organization's strategic goals.

We offer here a strategic framework and guidance for current and future nonprofit and public sector leaders open to exploring the ramifications and implications of engaging volunteers in mission-critical work. The information in this report emerged from the findings of *Volunteer Champions Initiative*, a research project funded by the Volunteer Impact Fund and conducted by The RGK Center for Philanthropy and Community Service at the LBJ School of Public Affairs at The University of Texas at Austin. This research engaged skeptics as well as 'true believers' in intensive dialogue about both their fears and their positive experiences with volunteers. We listened carefully to leaders living in Denver, Colorado and Austin, Texas. We heard their questions, we explored the shortcomings of working through volunteers and we garnered success stories. The *Strategic Volunteer Engagement: A Guide for Nonprofit and Public Sector Leaders* emerged as a result of this work.

Executive level support of volunteer involvement is a critical issue in volunteerism. This *Guide* is part of a larger effort addressing this critical need and builds upon and interacts with the work of some the advisors to this project. Specifically, Susan J. Ellis, President of Energize, Inc. is the author of *From The Top Down*. A third, revised edition of this best-selling book on the topic of *The Executive Role in Volunteer Program Success* will be published later in 2009. In addition, a "how-to guide" is under development by Betty Stallings, offering checklists, templates, and other practical tools to implement the principles Ellis' work presents. Stallings builds upon her earlier empirical analysis of executive directors specifically known for being supportive of volunteers; that work was previously produced as *12 Key Actions of Volunteer Program Champions: CEOs Who Lead the Way*. The publications of Ellis, Stallings and Rehnborg are designed to be complementary, together seeking to build a body of knowledge and inform current and future organizational leadership about effective practices supporting volunteer engagement.

### **A Word About Words**

Throughout this report we will be using several words interchangeably:

- *Leaders, executives and executive directors* apply to the leadership of both nonprofit and public sector organizations. Leaders may be nonprofit or public sector executives, nonprofit board members or public sector advisors, or elected officials and others in decision-making roles pertaining to community engagement.
- The term *volunteers* includes national service and service-learning participants, interns, 'traditional' volunteers, employee and service groups and those associated with service delivery for no or below market value remuneration.
- Although volunteers are involved in private/for-profit organizations as well as the public and nonprofit sectors, generally speaking, the term *nonprofit* will apply to all sectors of volunteer involvement.
- References to *Strategic Volunteer Engagement: A Guide for Nonprofit and Public Sector Leaders* within this report may utilize the full title of the report or may be shortened to *The Guide*.

This *Guide* may be used in conjunction with the case study "Go Volunteer Probono: Building the Case for Engaging Specifically Skilled Volunteers in Today's Nonprofit Sector" (<http://www.utexas.edu/lbj/rgk/research/casestudies.php>) for graduate and undergraduate course work.

## Volunteer Engagement: A Two-Way, Multifaceted Exchange

Traditional approaches to volunteer engagement often follow a model something similar to the process captured in Figure 1.

Sometimes this process achieves its goals; more often, the minimal effort put in by nonprofits results in minimal outcomes, meeting neither the needs of the organization nor those of the volunteers involved. In the end, volunteers are frequently blamed for the shortcomings, and, while the organization continues to publicly recite the platitudes of community engagement, the truth is that volunteer engagement is neither supported nor encouraged.

Five big challenges confront this model, each based on a particular false assumption.

While it is true that volunteers operate without receiving market-value compensation for the work performed, any serious organizational initiative—of any type—requires a strategic vision and an outlay of time, attention, and infrastructure. Someone needs to be assigned the important task of overseeing the venture, of facilitating community involvement, of preparing volunteers for the task at hand, of supporting their ongoing involvement, and of thanking them for the time given. The organization needs to know what it hopes to achieve and how that end product will help meet the overall goals of the group. The organization's staff and leadership need to be committed to working with volunteers and, in many cases, offered staff development opportunities to learn *how* to work well with the community. In short, a credible effort needs a vision and plan, resources sufficient to the task at hand, and a dedicated, skilled, point person to assure that tasks run smoothly and reach completion.

When it becomes apparent that effective volunteer engagement requires an investment, especially a financial investment, many nonprofit leaders hit a brick wall. Won't funders and board members see it as "cheating" to *invest* in *free* labor? On the surface, the two concepts appear antithetical. Complicating the matter is the issue of return on investment, the holy grail of financial decision-making. Frequently, nonprofits are willing to wrestle with the complex and nuanced concerns of making their own services tangible, whether protecting elders from abuse, granting wishes to dying children, or preserving green space in urban areas. But finding a way to concretize the *processes* involved in helping—and tying these processes to outcome measures—stymies many financial gurus and organiza-

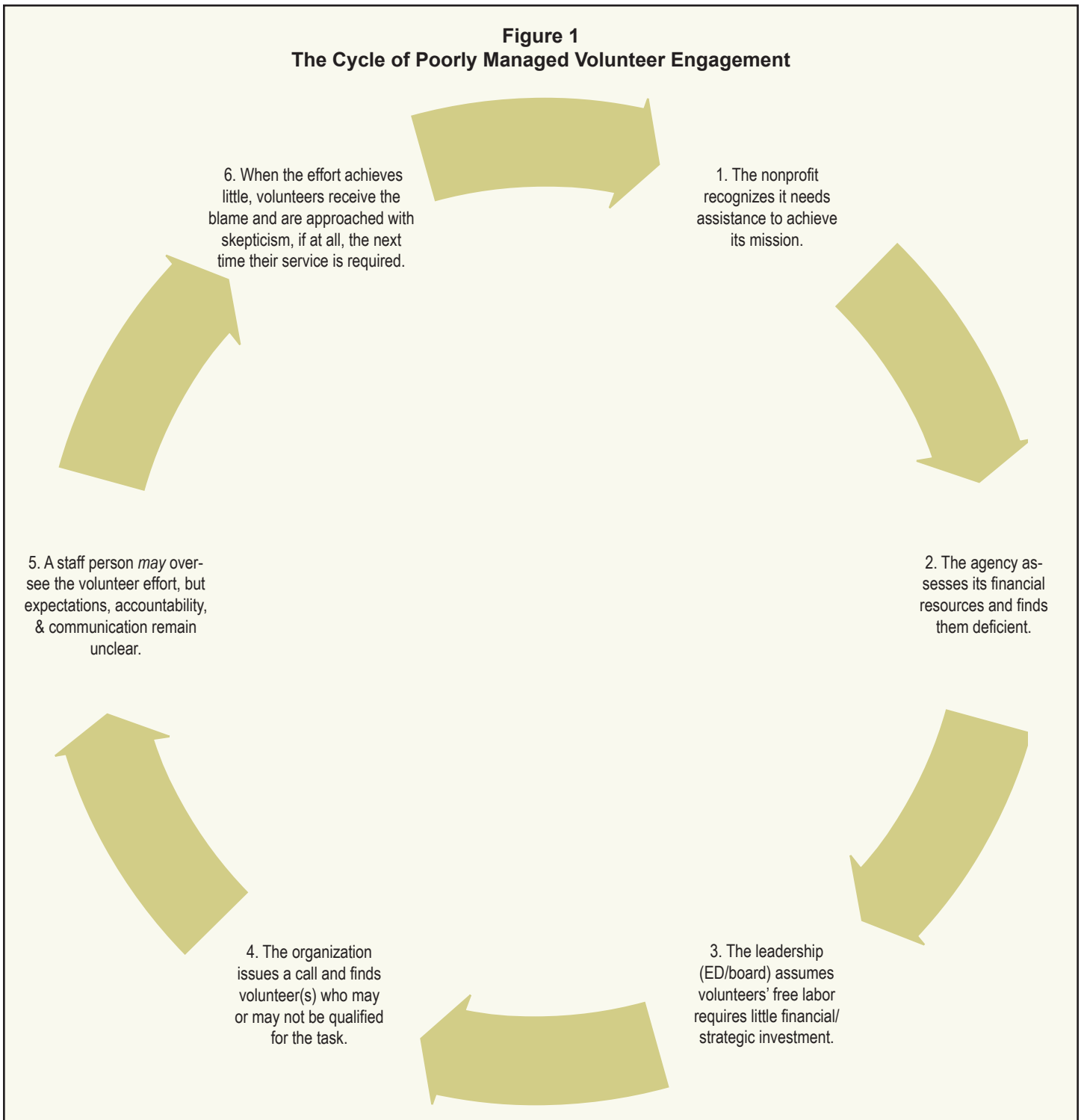
### **Myth #1**

**Volunteers are free.**

### **Myth #2**

**You can't "invest" in voluntary efforts.**

**Figure 1**  
**The Cycle of Poorly Managed Volunteer Engagement**



tional leaders alike. Nonetheless, volunteer engagement is a process, no different than fund development or marketing: it connects nonprofits with mission-critical resources. Few question spending money to raise money; spending money to raise people (a prerequisite to raising money) is just as necessary.

The model in Figure 1 suggests that the needs and motives of just one party in the volunteer-nonprofit relationship are important: the needs of the organization to see a task completed. As such, it contrasts with the nonprofit or public sectors' approach to nearly any other commonly cultivated relationship, where two-way exchanges predominate. For example, relations between a nonprofit organization and its staff are characterized not only by the work staff contributes to the organization but also by what the organization provides its employees (salaries, benefits, professional development, and the like). Similarly, relations with donors are characterized not only by the input of the donors' funds but also the organization's ongoing efforts to build a bridge with those donors. Clients, members, or constituents play a role in helping a nonprofit fulfill its mission; they receive in return products, services, and, often, opportunities for input into the organization's overall direction. Thus, only volunteers receive the exceptional—and generally unproductive—treatment of regarding *their* need in return for entering into a relationship with a nonprofit as vaguely equating to the nonprofit's own needs (i.e., the volunteer needs no more than whatever satisfaction can be attained in having helped you complete a task or meet a goal). What makes the matter worse yet is that many volunteers never learn how their efforts actually support the nonprofit.

If the volunteers' needs are considered within the equation at all, it is often from a negative or punitive perspective. Executives report that they are not in the business of meeting the needs of volunteers, that such a perspective can take away from attention to mission, and that any implication that organizations should expend effort considering the needs of volunteers only makes this community resource less attractive in their eyes. Likewise, EDs report that they fear potential negative exchanges with a volunteer. What if the volunteer doesn't work out for the agency and has to be removed from his or her appointed role? Erroneously assuming that volunteers cannot be "fired," nonprofit leaders dread getting *stuck* with a poor worker or, worse yet, experiencing negative consequences in the community. Such nightmare scenarios, regardless of their basis in fact, almost completely veil the potential value that may be reaped from a well-engaged volunteer base. Furthermore, such concerns overshadow the fact that productive and lasting relationships *of any type* are built when organizations seek to understand and meet the needs of the partner, whether that partner is a donor, staff person, board member, or community volunteer.

### **Myth #3**

**Volunteers want only what you want.**

### **Myth #4**

**Meeting volunteers halfway is a recipe for trouble.**



**Myth #5**  
**Volunteer “work”**  
**is best defined as that**  
**which staff wants no part of.**

The final challenge with poorly managed volunteer engagement is its oversimplification and tendency to silo away the possibilities inherent in volunteers' efforts. In many instances, the imagined task to be fulfilled has certain predefined characteristics that make agency leaders view it as work *for* volunteers—separate and, at times, lesser in value than other work of the organization. Sectioning off volunteers' work from other functions of the organization may make for a streamlined appearance in an organizational chart; however, it limits the scope of an agency's ability to leverage significant community resources—particularly when volunteer work becomes defined only as that which is rote or unappealing (or otherwise overlaps with tasks that staff feel overqualified for or prefer to avoid).

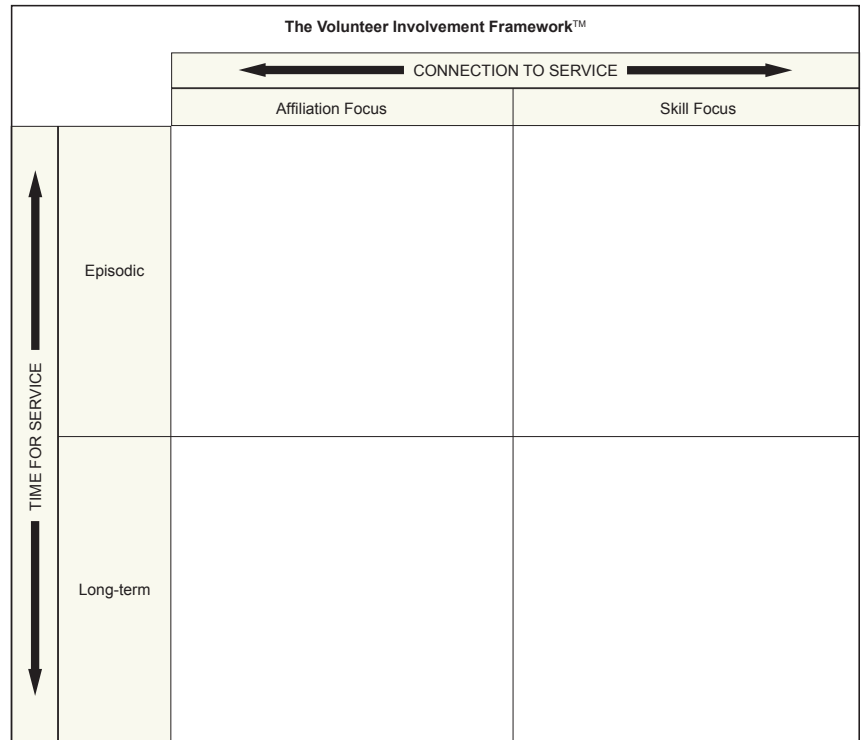
By contrast, diverse, multilayered volunteer engagement experiences—built on the abilities and interests of the volunteer, as they align with the overriding mission and goals of the organization—can address a host of discrete purposes within an organization. First, organizational leaders must learn to move beyond the stereotypes sometimes associated with volunteers, those images of unthinking, low-level robots available for any mindless task, and realize that the word “volunteer” connotes a pay scale, not a function. Volunteers manage archeological digs, train seeing-eye dogs, serve as board members, manage city government, fight fires, and run nonprofit organizations. What matters is the *vision* associated with the idea of volunteers and volunteering. Imagining low-level functionaries with limited abilities will lead you to design jobs only for such a person. On the other hand, envisioning a highly qualified artist painting a mural in your hallway, or a CPA overseeing a restructuring of your accounting systems, or a ropes instructor guiding your staff through a team building exercise will likely lead you to create and fill a position for just such a person with time and interest in service.

In fact, today's volunteers offer nearly unlimited potential to the nonprofit that is willing to move beyond these old myths. To achieve this perspective, the Volunteer Champions Initiative formulated The Volunteer Involvement Framework™. The Framework takes a broader view of volunteer engagement, considering both the needs of the organization and trends in present-day volunteerism. This perspective correlates the work that needs to be done in an organization with the management strategies needed to support that work and combines it with the volunteers' particular interests, motives, levels of commitment, and time availability. The Framework provides a starting point for examining the organization's current levels of involvement and creates a blueprint for planning for more extensive community input.

**The Volunteer Involvement Framework™**

The Volunteer Involvement Framework™ captures contemporary themes in volunteer engagement and organizes this information for prioritizing and decision-making purposes. The tool—developed with assistance from nonprofit leaders—enables executive-level decision-makers to identify their current volunteer engagement practices, examine additional service possibilities, and identify appropriate staffing and other management considerations. The Framework guides leaders as they analyze, plan, and make decisions, providing a useful visual summary that helps organize strategic thinking about volunteer engagement. In short, the Framework examines the full range of options available for creating a volunteer engagement system tailored to meet the unique needs of the organization.

The Framework is a simple two-by-two matrix. The horizontal “connection” columns distinguish between the two predominate orientations of volunteers currently in the market place. The first of these is the “affiliation-oriented” volunteer. This person gravitates to a service-opportunity in order to associate him or her self—with either the cause or with the mission or purpose of the organization, or with the group or network of friends engaged in the service. For this volunteer, the orientation to the type of service, or the friends or colleagues with whom they will serve, is of greater significance than the type of work being done. By contrast, the “skill-oriented” volunteer, represented in the column to the right, is a person who is more likely to express an interest in or a connection with the type of work performed as a volunteer. This person views the skills that he or she brings to service as paramount and wants to offer this specialized expertise to the organization.



The vertical “time” dimension of the matrix captures the person’s availability for service. The top row represents a short-term service commitment. Short-term may indicate a short stint of service (volunteering that occurs over a determined number of hours in one day or weekend), or it may suggest a specific, time-limited focus, where the volunteer signs on for a specific project that is limited in nature (although the project may occur on an annual or some other recurring basis). This volunteer is frequently called an “episodic” volunteer. The bottom row of the framework

		<b>The Volunteer Involvement Framework™</b> <i>Overview of Types of Volunteers</i>	
		CONNECTION TO SERVICE	
		Affiliation Focus	Skill Focus
 TIME FOR SERVICE 	<b>Short-term Episodic</b>	<p><b>Examples of Service:</b></p> <ul style="list-style-type: none"> <li>• Corporate days of service with work teams</li> <li>• Weekend house-build by a local service club</li> <li>• Park clean-up event or trail maintenance</li> <li>• Walkers, bikers, runners for annual fundraiser.</li> </ul> <p><b>Traits of Volunteers:</b></p> <ul style="list-style-type: none"> <li>• Strong sense of connection to the cause, work group, club, or organization.</li> <li>• Generally expects a well-organized event (materials and instructions immediately available to perform task, etc.).</li> <li>• May be using the service opportunity to investigate a particular organization.</li> <li>• May be part of a service group or meeting service requirements of a school, workplace, or club.</li> <li>• May have unrealistic/ naive expectations about the ability to impact clients or long-term work of the organization.</li> <li>• May prefer to identify with their service club or company rather than the organization being served.</li> </ul>	<p><b>Examples of Service:</b></p> <ul style="list-style-type: none"> <li>• A one-time audit of an organization's finances by a professional accountant</li> <li>• A sports club teaching a youth group a particular skill and hosting youth for an event</li> <li>• A student completing a degree requirement.</li> <li>• A chef preparing a meal for a fundraiser</li> </ul> <p><b>Traits of Volunteer:</b></p> <ul style="list-style-type: none"> <li>• Seeks a service opportunity tailored specifically to engage the volunteer's unique skill, talent, or resources.</li> <li>• May be any age, although slightly more likely to be adults with higher levels of skills/education..</li> <li>• Likely expects mutuality, i.e., a peer-to-peer relationship within the organization (accountant to treasurer; event host to ED; etc.)</li> <li>• May seek to negotiate timing of service.</li> <li>• Appreciates recognition that is tailored to the unique demands of the position.</li> <li>• May prefer to think of self not as a "volunteer" but an intern, pro bono consultant, etc., or other functional title.</li> </ul>
	<b>Long-term Ongoing</b>	<p><b>Examples of Service:</b></p> <ul style="list-style-type: none"> <li>• Youth mentor</li> <li>• Troop leader</li> <li>• Sunday School teacher</li> <li>• Environmental sustainability advocate</li> <li>• Hospice visitor</li> <li>• Park host or docent</li> <li>• Thrift store manager</li> <li>• Auxiliary member or trustee</li> </ul> <p><b>Traits of Volunteers:</b></p> <ul style="list-style-type: none"> <li>• Committed to the group or organization and the cause or mission it represents.</li> <li>• Often willing to perform any type of work for the cause, from stuffing envelopes to highly sophisticated service delivery.</li> <li>• May need specialized training to prepare for the service opportunity (e.g., literacy tutoring, etc.)</li> <li>• May feel a special affinity to the organization because of past benefit, family connection, or other personal allegiance.</li> <li>• May be any age, although age may segment type of cause most likely championed.</li> <li>• May be ideologically motivated (religious, political, environmental, etc.) to champion a cause or issue.</li> <li>• Appreciates regular recognition, both formal and informal.</li> <li>• Often uses personal pronouns to talk about organization (me, we, us, our)</li> <li>• In addition to strong motivations for service, may well be a key donor</li> </ul>	<p><b>Examples of Service:</b></p> <ul style="list-style-type: none"> <li>• Pro bono legal counsel</li> <li>• No-cost medical service by a physician, EMT, nurse, counselor, etc.</li> <li>• Volunteer fire fighter</li> <li>• Loaned executive</li> <li>• Board member</li> </ul> <p><b>Traits of Volunteers:</b></p> <ul style="list-style-type: none"> <li>• Similar to the quadrant to the left in commitment.</li> <li>• Generally prefers to contribute through specialized skills and training.</li> <li>• May elect to contribute talents through specialized service or may contribute time through policy and leadership roles such as board governance, visioning, etc.</li> <li>• Often expects volunteer management that reflects the cultural norms of the given specialty or skill.</li> <li>• Often combines talent with dedication to the cause, although the talent brought to the cause may supersede an allegiance to the mission.</li> <li>• May have historical ties to the organization or cause and/ or may have a family member (or self) who has benefited from the services of organization.</li> <li>• Expects staff support, assistance with resources necessary to the job, and recognition appropriate to work performed.</li> </ul>

represents the person who agrees to serve on a regular, *ongoing* basis, potentially making a *long-term* service commitment.

In the sample Framework on the next page, each quadrant contains examples of voluntary service that typify that area of volunteer experience, followed by a synopsis of the more common traits and motivations for service. Despite the linear boundaries of the graphic, it's worth noting that the Framework's four quadrants are not mutually exclusive and that some of the distinctions between them are fluid, flexible, and permeable. A volunteer may elect to serve in all four ways over a lifetime. Likewise, an agency or organization will want to examine opportunities for service within the organization that fall within each quadrant, thereby providing a maximum level of flexibility when recruiting volunteers.

In the remainder of this Guide, the Framework serves as a basis for conceptualizing a sustainable volunteer engagement program in four stages:

- *Understanding volunteer motivations and trends* (looking at the research on who volunteers are and what drives them)
- *Creating a vision for volunteer engagement* (thinking broadly about the four quadrants and how to plan for them)
- *Maximizing your investment in volunteers* (management/personnel strategies and a process for moving from vision to reality)
- *Minimizing challenges and embracing opportunities* (advice and resources that address leaders' top concerns about volunteer engagement).

Throughout the Guide and in the notes directly following it, you will find resources to assist with further development of your community engagement initiative, including online tools and assessments. Additionally, Appendix A, which contains a worksheet for you to make notes on your own organization's use of and/or plans for volunteers, allows for customization of The Volunteer Involvement Framework™ to meet your specific organization's needs.

## Understanding Volunteer Motivations and Trends

Volunteerism is multifaceted. Not only do people serve for a multitude of reasons, today's volunteers serve in a variety of ways and with various expectations for the return on their investment of energy and time. Additionally, not all people who serve without expectation of remuneration gravitate to the term "volunteer." Students may talk about *internships* or *community service* requirements. Teachers may seek *service-learning* opportunities in area organizations. Men tend to describe their service by the functions they perform (*coach, trustee*), while women have historically been more connected to the term *volunteer*. Theological interpretations of service vary. Some religiously motivated volunteers feel *called to serve*, while others say they're compelled to *live out their faith* and still others seek to promote *social justice* through service. Professional associations may talk about *public interest* work or *pro bono* opportunities. The very act of expanding the vocabulary associated with volunteer work opens up new ideas for envisioning service.

### Figure 2 Volunteering Facts

- Number of Americans who volunteer regularly: 61 million
- Percentage of Americans who volunteer: 27%
- Total hours volunteered in the U.S. in 2006: 12.9 billion
- Average volunteer's hours of service in 2006: 207
- Average number of people volunteering on any given day: 15 million

Source: *The Nonprofit Almanac 2008*

Research on volunteerism provides interesting insights (see Figure 2). Data from the Bureau of Labor Statistics, U.S. Census Bureau, and the Corporation for National and Community Service (CNCS) indicate volunteering today is at a 30-year high (CNCS, 2006). Older teenagers (16- to 19-year-olds, motivated by service-learning opportunities and similar trends), retirees (over 65), and mid-life adults (45 and older) are fueling this growth. Together with other volunteers, they constitute a workforce numbering nearly 61 million, who give, on average, nearly four hours per week in charitable service (Wing, Pollak, & Blackwood, 2008).

Some researchers find even higher levels of engagement. For example, according to Independent Sector, when *all* volunteer involvement is accounted for—not only in charitable organizations but also in religious groups, schools, communities, and informal neighborhood groups—the total unpaid labor contribution climbs even higher (Independent Sector, 2001). Estimates of the value of volunteer labor suggest the United States benefits from the equivalent of \$239 billion of unpaid staff time or the equivalent of a full-time workforce of 7.2 million employees (Wing, Pollak, & Blackwood, 2008). (For specific information about volunteering in your community, Volunteering in America offers excellent state- and city-level data at its interactive website: [www.VolunteeringInAmerica.gov](http://www.VolunteeringInAmerica.gov)).

Although motives for volunteering are as varied as the volunteers

themselves, numerous studies (Bureau of Labor Statistics, 2007; Independent Sector, 2001; Musick, Rehnberg & Worthen, n.d.) have found a common denominator: “being asked” is one of the key drivers for volunteerism, with adults and young people alike citing it as among the top reasons they elected to volunteer or learned of the opportunity in the first place. Another primary driver for volunteers is affiliation with a cause or belief system—such as the desire to make a difference, to support a particular organization’s work, a religious sense of obligation, or simply “wanting to give back.” Others are motivated by external affiliation-relation incentives, such as a desire to meet others, to be part of a team, to fulfill a youth-service requirement, or to meet the membership requirements of a service club. Finally, evidence suggests a growing number of volunteers are driven by an interest in learning a new skill, the desire to maintain skills while temporarily stepping out of the job market, the desire to explore a career opportunity or using skills they’ve developed over a lifetime (Musick & Wilson, 2008).

Each of these distinct motives reflects trends in society and in volunteerism at large. Volunteers continue to be more well-educated, more likely to have families, and more socially connected than the population as a whole. They also have distinct interests and needs. For example:

- *Episodic volunteer opportunities*: Those with limited time but an interest in doing service on a temporary basis are being drawn to events such as day-long house-builds with Habitat for Humanity, community park trail maintenance days, or special vacations featuring “volun-tourism” away from home.
- *Service linked to the private sector*: Corporations and business groups, working to bolster their community involvement, do so by participating in programs to “adopt” a school or stretch of highway, complete a “day of service,” create technological brain trusts for nonprofits in need, or encourage employees to join self-guided hands-on service opportunities, often facilitated by a local volunteer center or United Way.
- *Youth and student service*: Students competing to build their resumes and enhance their college applications are motivated to help their communities, frequently spending long hours in unpaid internships, engaging in service-learning, or participating in service clubs and youth groups.
- *Opportunities for those who have left the labor force*: The most edu-

cated group of retirees in history—as well as the growing number of adults having children later in life, who may have left the workforce temporarily but seek to apply their knowledge in “giving back”—are increasingly available to devote their skills, time, and resources to volunteering.

- *Virtual volunteer work:* While we generally think of volunteering done in-person, on-site, today's technologically inclined volunteers also find ways to contribute service via the internet. These “virtual” volunteers, like persons appearing at the office, may be willing to perform a one-time service (e.g., revise an organization's website) or to sign on for an extended time commitment, such as serving as an online mentor.

From all these trends emerges a picture of a service sector inundated with available talent, labor, and opportunity, available to any organizational leader savvy enough to capture this workforce and capitalize on that which drives their service. Understanding the changing face of volunteers in America, as well as the top motivations for volunteering, provides an essential foundation for applying the Volunteer Involvement Framework™ strategically to maximize volunteer contributions.



## Developing a Vision for Volunteer Engagement

Identifying who volunteers is only one step of a larger process—a process that, in fact, does *not* begin with recruiting volunteers. Instead, the process begins with an internal assessment and analysis of your organization. Giving forethought to how and where volunteers fit within your organization's larger mission, and how a vision for volunteer engagement fits with other strategic goals, creates a solid foundation for success. What follows is a template for planning or for reassessing your volunteer-engagement strategy. [For a more detailed accounting of executive leadership in volunteerism, see Susan Ellis's *From the Top Down: The Executive Role in Volunteer Program Success* (Energize, Inc.: Philadelphia; 1996), which served as an important source in the development of this Guide.]

An important precursor to vision-setting is an examination of biases. Nonprofit leaders sometimes get stuck in modes of thinking that limit the possibilities of volunteers within their organizations. A key ground rule for guiding your analysis is to remember that *there are no tasks volunteers cannot do*. A person with the requisite skills, abilities, licenses, training, and time can perform any job. Medical personnel volunteer their time at clinics performing all the duties ascribed by their training; attorneys perform pro bono work on a regular basis; trained community members serve as firefighters, auxiliary police, and many city mayors work without pay; some nonprofits are run by full-time, nonsalaried executive directors. The list is endless. While it is certainly true that few people have this level of extended time to contribute, the fact is that a person may do any job, and perform equally to those with a salary, on a volunteer basis—provided an organization's leadership is open to such limitless possibilities.

Likewise, *people from all walks of life volunteer*. Overlooking any segment of the community unnecessarily closes a door to possible volunteers. Keep in mind that some of the nation's most active volunteers include senior citizens, not to mention the contributions of people with disabilities, people with limited incomes, parents of young children, and even children themselves—any of whom may be willing to serve in a variety of capacities, from hands-on frontline assistance to policy development and board service. When it comes to working with young volunteers, child labor laws do *not* preclude young people from volunteering (Ellis, Weisbord, & Noyes, 2003), so organizations frequently engage even elementary students in age-appropriate endeavors. Research tells us that young people, particularly those who volunteer with members of their family, become lifelong volunteers (Rehnborg, et. al., 2002; Musick

### Step 1

Begin with an open mind.



& Wilson, 2008). Thus, engaging families and youth can help provide you with a vital community resource for years to come.

**Step 2**  
**Include staff and board**  
**in the process.**

Comprehensive community engagement initiatives benefit greatly from the input and active planning of your key stakeholders and staff. One of the best ways to prevent resistance to volunteers is to include staff and board members in the planning process from the beginning. Do not feel like you alone must develop and construct a compelling vision to build an effective program. Including staff in your planning enables your employees to explore the nuances of service and helps to prepare them to expand their reach through volunteers. And, board members, themselves volunteers, may fail to see the connection between their type of governance or policy volunteering and the more direct-service opportunities offered to other volunteers. The planning process acts as an exercise in staff/board development, leading these key stakeholders to begin thinking strategically about volunteers, to articulate a shared language around community engagement, and to explore how volunteers fit within the organization's core values and mission. Thus, engagement becomes not just about the community outside of your organization, but also an exercise in building internal community, as well.

**Step 3**  
**Take stock of where you are**  
**and where you hope to go.**

Because volunteer engagement does not exist in a vacuum, plans for community involvement should be integrated within the existing strategic plan for your organization's future direction. The most important question to ask when contemplating a community engagement initiative is *"What is the work that must be done to achieve the mission and goals of our organization?"* Asking this question ensures that volunteer opportunities *fit* within the overall objectives of the organization and the plan for moving forward. Additionally, the question benefits volunteers, who surely care whether their time and talents make a difference. Volunteers thrive when they can see that the work they perform is central to the organization: work that impacts the organization's bottom line—its mission.

Once you've reviewed your strategic direction and committed to holding those goals in mind, any one of the following methods can help your planning team get started in creating a specific vision for volunteer involvement.

- *Brainstorming*  
 This group process combines the creativity of all to generate new and creative ideas for involving the community in reaching your mission. The basic rule of brainstorming is that any and all ideas are worth considering: everyone on the planning team should

be open to the idea that no limits exist to the potential work of volunteers and that nothing said will be ruled out entirely. The facilitator should encourage the group to be creative, even daring (keeping in mind, today's high-powered retirees, stay-at-home parents, etc. are eager for creative challenges). Posing a question for all to respond to (e.g., "What work needs to be done to meet the goals and objectives of this agency?" "What additional services do our clients want and need?") helps initiate the brainstorming process. One person acts as a recorder, keeping a list of all the answers offered to the question about service opportunities for volunteers. The process also allows people to build and expand upon the ideas of others. Once the list is complete, the facilitator brings the process to completion by guiding the group through an exercise to weigh and prioritize the various opportunities generated.



- *Visual "mapping"*

Much like brainstorming, a visual map can be developed by asking your group to visualize the optimal participation of volunteers in your organization at some point (5 years? 10 years?) in the future. To set the stage, you would ask your participants to assume that resources were unlimited and sufficient space is available. Given this scenario what would your ideal organization look like? How would staff and clients benefit? How would each function of the organization be changed? Diagram or sketch these visions on a large backdrop that everyone can see. Then work backwards and determine where the organization would have to begin to make this desired future a reality. Be sure that someone captures all the ideas presented.

- *Needs analysis*

Originally developed by Dr. Ivan Scheier more than 30 years ago, the Need Overlap Analysis in the Helping Process (NOAH) is a tool that is as useful today as it was when first promoted (Scheier, 1975). The NOAH system begins with staff members (led by the executive director, who also participates) completing a laundry list of each person's total job duties and responsibilities. Once the task lists are developed, each staff participant next develops a wish list of additional activities they would like to be able to

tackle, if time and resources permitted. Finally, each person culls through these lists to assess which activities would conceivably benefit from volunteer involvement. Through subsequent interviews with potential volunteers, these lists can be extended to include the skills, interests, and abilities of the volunteer. After discussing the possibilities, prioritize and decide how to translate activities targeted for volunteer involvement into reality. Service opportunities that combine the interests and needs of volunteers, staff, and clients are most ideal; however, collaborative efforts between volunteers and staff or between volunteers and clients may prove beneficial as well. (Although no longer in print, an online version of the full NOAH process can be found at [www.service-leader.org](http://www.service-leader.org).)

**Step 4**  
**Move from vision**  
**to logistical reality.**

Practice wisdom tells us that there are four keys to making a plan or system operational: a vision that guides the plan; clear targets for progress (i.e., goals and objectives for action); a qualified person responsible for overseeing the plan; and the allocation of financial resources to support the plan.

The vision for the plan emerged through your planning process. As you examined opportunities for community engagement, you and your planning committee identified ideas that fit the needs and concerns of your organization. You might look back at that stage of development and see if any underlying themes or ideas emerged that guided your decision-making. Capturing those concerns succinctly, and framing them into a guiding vision or philosophy is important. This guiding vision should be developed into a strategy or mission statement for community engagement, or some other brief document that is circulated and made widely available. This document will guide your efforts and serve as a touchstone when important decisions need to be made.

From that statement of vision, a set of clear goals to achieve it should flow naturally. By creating measurable statements of intent, including short-term objectives and long-term anticipated outcomes, the planning committee will define the nature of the work to be accomplished. This also will present an opportunity for staff and board to weigh in with a reality check: where will the resources come from to support these objectives? Who will shepherd the civic-engagement initiative through its various stages? Appendix B captures a schematic of work involved in developing a comprehensive volunteer system. Your initiative may be more modest than the one presented in the schematic, however, it does outline the sequential nature of the work and the details involved.

Selecting a point person to guide the volunteer engagement effort is critical, ensuring it becomes *someone's* responsibility to move your plan to action. This person may be you. If not you, it will need to be someone who enjoys your full support and assistance as this new venture takes shape. Additionally, it will need to be a person who has been given the time to undertake the work. Effective community engagement programs—even small efforts—take time. To be effective in this role your point person must either be engaged to take on this effort or be relieved of other duties so that he or she can invest the time necessary to achieve the important end results.

Finally, your action plan should include a budget, inclusive of not only the dollars but other costs to your organization of working with volunteers. These may include staff time, facilities, supplies, and equipment required to facilitate involvement. Weigh how your nonprofit will accommodate the fact that increased numbers of volunteers equates to increased numbers of people in your organization—people who take up space, often need to use computers, may want to drink coffee, and *will* want to park their cars. Such creature comforts alone won't attract volunteers to your nonprofit, but the absence of them can assuredly lead to poor volunteer retention. Additionally, you will need to decide appropriate lines of communication, set up databases, and determine appropriate screening procedures. Touching on these types of logistics with the planning team *before* embarking on a new volunteer recruitment initiative can save numerous headaches down the road.

Where model program for volunteers exist, it's worth exploring opportunities for replication in systems, approaches, training, and more. Consider looking for examples of volunteer engagement from among other nonprofits in your community or issue area, particularly those that have achieved successes with volunteers. Such benchmarking could set up opportunities for collaboration, while also preventing your organization from reinventing the wheel if an existing template fits within your agency's needs. The text box on page 21 illustrates one executive director's success with creating a vision for volunteer engagement out of just such a benchmarking experience.

Additionally, be aware that your organization's staff will seek a template for volunteer engagement, as well. It may be necessary to dedicate some professional development and training time to this topic, or staff may simply look to you, the agency leader, to model effective volunteer involvement. Your leadership can model your commitment to the plan if you give your staff an opportunity to witness firsthand how *you* work with volunteers. Staff will perceive

**Step 5**  
**Benchmark others' successes with volunteers.**

not only what working with volunteers may require of them (investments of time, certain behavioral modifications, etc.) but also the potential payoffs for taking work with volunteers seriously.

**Step 6**  
**Decide how you'll**  
**measure success.**

Setting up metrics to evaluate the success of your community engagement efforts can prove complex, but several tools exist to provide support. These metrics can help your organization determine whether the anticipated outcomes of the volunteer engagement initiative were met and provide the data that will make the case for continued support for your efforts to board members, funders, and other stakeholders.

- *Quantitative measures*

Databases can be programmed to track not only the number of volunteers in your agency and their hours spent in service, but also whether their service correlates with other outcomes important to your organization. (For example, Are they raising the public profile of your organization? Are they donating, attending events, or becoming members, in addition to giving their time? Have you been able to serve more clients or provide more effective or comprehensive service because of volunteers? Has volunteers' service enabled you to secure matching cash contributions from their employers contingent on hours of service? Have they referred others to your nonprofit? Have they increased their service over time or begun serving your organization in new capacities, perhaps making the shift from episodic volunteers to ongoing volunteers, or adding new skills within the time they give? Have they opened doors with funders or other potential donors?) Such metrics can become part of your agency dashboard, something you see and refer to regularly in staff meetings, board discussions, and annual reports.

- *Financial measures*

Another quantitative approach is to determine the organization's return on investment, by placing a value on volunteers' time. Several methods for this exist (e.g., comparing the work to its average wage in the marketplace, accounting for the opportunity cost of volunteers' time, etc.). Resources for conducting volunteer valuation can be found online at [www.rgkcenter.org/investigator](http://www.rgkcenter.org/investigator), including an article, "Placing a Value on Volunteer Time," (2005) that outlines several tools available to nonprofit leaders.

- *Qualitative measures*

Scheduling exit interviews or after-action reports with volunteers who have completed a significant project or service commitment

enables you to learn more about their experience. Meet with staff supervisors or board members engaged in the action to process the outcomes, and think about surveying your volunteers periodically or holding casual focus groups to garner their input. Report volunteer involvement successes and highlight accomplishments in your organizational newsletter, reports to funders, website content, and elsewhere, and clip press reports about your organization, watching for the presence of volunteers. Community involvement often helps to garner positive attention in the community and provides positive PR for your organization.

### Envisioning a Place for Volunteers

During a perfect storm of organizational crises at the Austin Children's Museum, Mike Nellis stepped into the role of executive director. Not only did the organization face the impending loss of its lease and the need for a new capital campaign and building, it also struggled with internal strife at various levels, from a board of directors in transition, to a confrontation-prone staff, to a disengaged pool of volunteers. Much about the organization felt adrift, with hardly any room for volunteers in an organization that, at the time, had no home of its own.

After conducting an organizational assessment amid these challenges, identifying strategies for moving forward, and starting anew in a central downtown location, Nellis and the Children's Museum made a call he has never regretted: to pay much more attention to the place of volunteers in advancing the organization's goals.

In years past, volunteer coordination had fallen under the umbrella of the museum's fund development department, with the thinking that perhaps volunteers' key function lay in their capacity as committed, potential donors. This tactic, Nellis wryly notes, "didn't work very well."

He adds, "Previously, the Children's Museum had an internal culture of believing volunteers were meant to be cultivated as donors and, otherwise, were sometimes more pain than they're worth."

Nellis set about changing that culture: by having the volunteer coordinator directly report to him, by asking high-level staff to model productive relations with interns and other volunteers, and by pursuing a grant to allow the Children's Museum to benchmark a sophisticated volunteer-engagement program in another city. "I saw huge potential to use volunteers to improve quality of service," Nellis says. "Now instead of offering just feel-good opportunities, we have folks working in a way that's mutually beneficial to our organization and to the volunteer."

The organization's new system for volunteer engagement, based on a model originated at the New York Hall of Science, creates lifelong opportunities for connection to the museum's work: as young user, "junior volunteer" (elementary-aged museum-camp attendant), counselor-in-training (high-school camp leader), college student, and professional industry expert. This "science career ladder" for volunteers mirrors the opportunities for professional development, training,

networking, and advancement the Austin Children's Museum makes available to its own staff.

"The goal," Nellis explains, "is to create a seamless integration between paid and unpaid workers. At the front end, this takes a lot of work—a lot of training, education, checking in, and making sure volunteers are having a great experience. But the value is that volunteers' contributions are able to match that of staff on the floor. We're serious about the work we do, and we want our volunteers to be serious, too."

Participants in the science career ladder join a complement of back-office volunteers who assist with administrative components of the museum's work, creating a "bifurcation between volunteers who work directly with kids and those who don't." As a result, volunteers now have a defined place in the museum's operations and are identified as key players on the agency's organizational chart. "We use volunteers as extensions of our staff," Nellis says. "We've found, if we can enhance the meaning of the experience for the volunteer, services to visitors are enhanced in the process."

## Maximizing The Volunteer Investment

Just as thoughtful, careful planning is necessary for any level of volunteer involvement, so, too, are resources to do the job, including funds and staff time. Numerous studies have found that—“free” labor, notwithstanding—the old adage *you get what you pay for* applies to volunteer programs (Adalpe, et. al.; 2006; The Grantmaker Forum on Community and National Service, 2003; Rehnborg, et. al., 2002; Hager, 2004). The bottom line is this: the more energy and resources nonprofits expend on community engagement initiatives, the greater their return on the investment.

The level and extent of your volunteer engagement initiative determines your staffing complement. Utilizing The Volunteer Involvement Framework™ grid, we will examine the traits of each quadrant and the resultant management recommendations. Keep in mind that volunteer engagement initiatives that span the quadrants of the grid will require greater levels of management resources.

### A Question of Management and Staffing

Making the decision to hire a new person on either a full- or part-time basis is always complex and requires careful analysis. Because volunteers generally work for no pay, many nonprofits initially assume that the leadership of the program can also be secured without a paycheck. In her excellent treatment of the subject of when to pay for help and when to engage volunteers for a task, Ellis notes that, while volunteers' *qualifications* can be equal to or beyond that of staff in every way, providing a paycheck serves four critical functions: “Offering a salary gives the agency a predetermined number of work hours per week, the right to dictate the employee's work schedule, a certain amount of control over the nature and priorities of the work to be done, and continuity” (1996, p.12). Thus, handling a significant workforce of volunteers (and especially if those volunteers serve over a long period of time and perform highly skilled work) likely requires the sort of availability and commitment than an organization usually finds in a *paid* staff member.

Once the commitment has been made to hire for the position, some executives look to fill a volunteer-manager opening from within the ranks of existing volunteers. The underlying assumption, that someone committed to serving your organization would welcome the opportunity to come on board in exchange for a paycheck, sometimes misunderstands the challenges inherent in moving from *being* a volunteer to *managing* other volunteers. Having a clear job description, laying out the necessary skills and aptitudes of the job, will allow you to assess

The Volunteer Involvement Framework™ Consideration for Managing Volunteers			
← CONNECTION TO SERVICE →			
		Affiliation Focus	Skill Focus
↑ TIME FOR SERVICE ↓	Short-term Episodic	<p><b>Necessary Volunteer Manager Traits:</b></p> <ul style="list-style-type: none"> <li>• Good project leader with solid planning and project-management skills, attention to detail</li> <li>• Strong interpersonal skills: diplomatic, flexible, and accessible</li> <li>• Should be a good spokesperson for the cause: knowledgeable and passionate</li> <li>• Has time to interface with group liaisons</li> </ul> <p><b>Other considerations:</b></p> <ul style="list-style-type: none"> <li>• Collect contact information on volunteers to follow-up with other service and giving opportunities.</li> <li>• Consider rotating management task among existing staff members who meet qualifications (but be sure at least one person is maintaining oversight, centralized records).</li> <li>• Budget adequate funds for project-related resources including refreshments for work groups and possible recognition memorabilia.</li> </ul>	<p><b>Necessary Volunteer Manager Traits:</b></p> <ul style="list-style-type: none"> <li>• Strong human resources skills, respect for volunteer and job-sculpting expertise</li> <li>• Marketing skills to lead targeted recruitment effort; should be able to tell the organization's story, and to relate the specific task to your mission</li> <li>• Flexible, with willingness to adapt a project to the volunteer's expectations and time constraints</li> <li>• Open and available for follow-up and able to monitor progress collaboratively</li> </ul> <p><b>Other considerations:</b></p> <ul style="list-style-type: none"> <li>• These volunteers expect to be treated as respected equals, not as subordinates.</li> <li>• Nonprofit should be open to sharing relevant information as the volunteer gains knowledge of the agency, earns trust, and prepares for the task.</li> </ul>
	Long-term Ongoing	<p><b>Necessary Volunteer Manager Traits:</b></p> <ul style="list-style-type: none"> <li>• Has significant time to devote to volunteers</li> <li>• Is knowledgeable about overall organization and its future direction</li> <li>• Has strong interpersonal and organizational skills and genuinely likes people</li> <li>• Continuity of leadership and institutional history helpful</li> </ul> <p><b>Other considerations:</b></p> <ul style="list-style-type: none"> <li>• These volunteers require a comprehensive volunteer infrastructure (e.g., dedicated staff person with not less than 20 hours per week dedicated to working with volunteers).</li> <li>• Budget to cover necessary program expenses (e.g., volunteer expense reimbursement, regular recognition, etc.)</li> </ul>	<p><b>Necessary Volunteer Manager Traits:</b></p> <ul style="list-style-type: none"> <li>• Usually the management person most closely aligned with volunteer's (or volunteer committee's) skill area must oversee work</li> </ul> <p><b>Other considerations:</b></p> <ul style="list-style-type: none"> <li>• As with quadrant to the left, dedicate considerable infrastructure to support these efforts (including necessary time and attention of ED and/or board members).</li> <li>• Time should be allocated for personal staff interactions with the skilled volunteer to support volunteers' efforts and to learn from their observations.</li> <li>• Mechanisms to keep the volunteer(s) in the organizational informational loop and resources to assure an appropriate work station, expense reimbursement, and recognition are critical.</li> </ul>

candidates accordingly. An excellent resource on volunteer management, which includes sample job descriptions for the position, can be found on Idealist.org in their Volunteer Management Resource Center section. See <http://www.idealists.org/en/vmrc/vmcareer.html>.

Position justification is a concern frequently raised by executive directors. As noted earlier, it is no more inappropriate to hire a volunteer manager than it is to hire a fund development director or marketing manager (see Myth 2, on page 4). Historically, most nonprofit organizations emerged from the work of a committed



group of volunteers who championed a cause. As the work grew, the founding board sought funds to hire a leader for the organization, a person with the time and the expertise needed to take the group to its next level of functioning: the executive director. The same rationale applies to the position of volunteer manager. If you truly seek to maximize the contribution of volunteers, your investment in this effort will deliver gains equal to your investment and your efforts. The textbox on this page offers an illustrative example of how creative volunteer management can maximize nonprofit investment in volunteers. Additionally, the questions in Appendix C are designed to help you as you deliberate about hiring a volunteer manager.

### ***Building Capacity through Volunteer Management***

When Suki Steinhauser stepped into the role of chief executive officer at Communities in Schools (CIS), a dropout-prevention program in Central Texas, she knew that her predecessor, the nonprofit's founding CEO and leader of 18 years, had provided her with many ingredients for success. Having nurtured relationships with dozens of educators and funders and built the systems to put licensed social service professionals at more than 50 school campuses, the former CEO had provided a recipe for stable services to benefit tens of thousands of children and youth.

What Steinhauser added to this mix was something she calls her "secret sauce": a new hire in volunteer management, whose support made it possible for CIS to involve more than 600 new volunteers in her first year alone, fostering a committed team of community advocates for CIS.

Prior to the creation of the director of volunteer services and community partnerships position, CIS had operated with support from approximately 350 volunteers annually, all of them board members, AmeriCorps members, interns, tutors, or mentors. Each of these roles served a key function, yet all required a significant time commitment from volunteers, as well as a willingness to adhere to CIS's training, vetting, and match requirements. Steinhauser and Alissa Magrum, the new

director of volunteer services and community partnerships, envisioned adding depth to existing services by creating new avenues for volunteering that would attract more community members who shared CIS's goal of dropout prevention.

"Working with kids in poverty is a case where the more services you can give, the greater the payoff," Steinhauser says. "One of the first things Alissa was able to do was connect with our field staff at each of our campuses and find out what other needs they had, beyond what tutors and mentors provided."

Numerous issues surfaced: campus offices hobbled by worn and dilapidated furniture, outdated computers, and dull paint; resource-strapped children who lacked school supplies to start the academic year right; high-achievers from CIS's afterschool programs who had gone unrecognized for their hard work. In response to each of these challenges and more, Magrum mobilized a series of community engagement initiatives—"extreme makeover" corporate days of service to remodel campus offices, a community wide school-supply drive, a volunteer-driven annual recognition celebration to honor outstanding students—each of which ultimately served the agency's mission.

Today, Steinhauser credits volunteers not only with "providing us with the

capacity to do more, more creatively" but with raising the profile of CIS in Central Texas. The CEO believes the volunteer coordination, made possible by her investment in dedicated staff, created public-relations ramifications for CIS that would otherwise have been unimaginable. "So much of what we do is direct service, embedded within the schools, but we also have a duty to do advocacy in the community," she notes. "The more volunteers we bring in, the more advocates we have with the exposure to what otherwise is an invisible organization behind school doors." Steinhauser points to the example of one young professional volunteer who staffs a legislative office in Austin and whose service has helped educate her—and her elected-official boss—about the region's dropout problem.

Steinhauser emphasizes that adapting to volunteers' schedules, while aligning volunteers' activities with direct needs of the organization in service of its mission, has opened a world of possibilities. "If somebody has a great experience with the school supplies drive, maybe they'll decide to become a middle school mentor, or their child will grow up to want to be one of our AmeriCorps members," she explains with a smile. "You just never know when a volunteer comes through your door, if they have a good experience, what else can come your way."

## Minimizing Challenges, Embracing Opportunities

Few leaders will openly cast aspersions on the dedication of volunteers or the virtues of community involvement, yet benign acceptance can also mask serious reservations, if not outright hostility, towards volunteers. This section of the Guide addresses some of the more common issues in volunteer engagement, presenting some of the challenges and opportunities inherent in these initiatives.

The opportunities, challenges, and liability considerations for service projects within each of the quadrants are captured in the Framework on the next page. Although the concerns vary by the dimensions of the quadrant, a few considerations are universal.

### **Liability**

In today's litigious society, nonprofit organizations need to be careful, thoughtful, and thorough in any project they undertake, ensuring proper consideration of risk management and liability. Although a thorough risk assessment analysis is beyond the scope of this Guide, nonprofits would be well advised to exercise for volunteers the same caution advocated for client care and general staff protection for positions of equal responsibility. A well-managed program should include up-to-date records and well-documented personnel files, noting all trainings attended and reference checks conducted, as well as the results of these reference checks. In addition, a comprehensive community engagement program should include a policies and procedures document that outlines regulations pertaining to volunteer/client contact within and outside of the work setting; expectations for uses of personal vehicles and levels of personal insurance required if client transportation is anticipated; procedures on how to handle injuries received during the course of service; and any other guidelines that you would institute for staff serving in similar positions. A comprehensive orientation to volunteer work provides an opportunity to share this information with volunteers.

Insurance is available for volunteers operating within the regulations of a formal organization. The low cost of this coverage suggests the relative safety of such undertakings; nonetheless, an exploration of available options is important. For an example of such coverage, see <http://www.cimaworld.com/htdocs/volunteers.cfm>. Intermediary organizations for nonprofits and large nation organizations with numerous affiliates frequently offer support and information about liability and risk management as it pertains to volunteer involvement. Another particularly useful resource for nonprofit organizations is the Nonprofit

Risk Management Center, based in Leesburg, Virginia, which offers a host of references and useful articles (<http://nonprofitrisk.org/library/articles/insurance052004.shtml>).

While precautions and risk assessment are wise, overestimating the risk associated with volunteers can create undue burdens. It is generally unnecessary to do criminal background checks—or even reference checks—for most volunteers participating in one-time group events or in some positions unrelated to contact with vulnerable clients. Allow the complexity of the assigned task to dictate which risk management measures you take, and drop any that add unnecessary bureaucracy and obstacles to service. As always, however, check with your agency's legal counsel or insurance provider to determine the right line of action for your organization.

### **Record-Keeping**

Effective nonprofit management includes accounting for and supporting the agency's volunteers. Each volunteer's involvement serving your organization should be a matter of record. Set up the organization's database and paperwork so that records of volunteer involvement not only capture the information to protect you against liability concerns but also to provide the data you need in evaluating the success of your program. (For support in developing recordkeeping systems, see Ellis and Noyes' 2003 publication, *Proof Positive*.)

What information you record about volunteers' service will depend not only on the requirements of the organization, but also those of the volunteer and your agency's stakeholders. For example, a student fulfilling an educational requirement (service-learning or course requirement) or volunteering to meet licensure requirements for a particular profession will require certain codification of his involvement in your organization. Additionally, insurance carriers may require particular data-keeping practices to cover your volunteer in the event of injury. Funders may accept volunteer service as part of a match requirement and sometimes have their own reporting requirements on volunteer involvement.

### **Dismissal**

While it true that occasionally volunteers do not work out, such problems are fortunately rare! A well-managed program is the best prevention from contentious volunteer relationships. When volunteers have well-developed position descriptions, have been capably screened, oriented and trained for the position they will fulfill, and are given adequate staff support and recognition, programs generally run smoothly. However, it is true that, once in a

		<b>The Volunteer Involvement Framework™</b> <i>Weighing Opportunities, Challenges, and Risks</i>	
		CONNECTION TO SERVICE	
		Affiliation Focus	Skill Focus
 TIME FOR SERVICE 	<b>Short-term Episodic</b>	<p><b>Opportunities:</b></p> <ul style="list-style-type: none"> <li>• Can help promote organization, spread message, and build mailing list.</li> <li>• Ideal for accomplishing short-term, intensive work to grounds or building.</li> <li>• May use in database for advocacy, fund raising, or volunteer recruitment.</li> </ul> <p><b>Challenges:</b></p> <ul style="list-style-type: none"> <li>• Not always possible to provide client-oriented service.</li> <li>• Considerable advance planning required to assure that materials are available for large-scale service projects.</li> <li>• Requires flexible schedule for staff leadership.</li> </ul> <p><b>Liability:</b></p> <ul style="list-style-type: none"> <li>• Dependent on service project selected; best to notify insurance carrier of the date.</li> <li>• May require an event rider on agency policy.</li> </ul>	<p><b>Opportunities:</b></p> <ul style="list-style-type: none"> <li>• Great way to secure important assistance not otherwise available.</li> <li>• Ideal training ground for more intensive service (e.g., committee, taskforce, or board work, as well as work in quadrant below).</li> <li>• Worthy addition to agency database.</li> <li>• May use service opportunity to evaluate person for possible employment.</li> </ul> <p><b>Challenges:</b></p> <ul style="list-style-type: none"> <li>• Poorly handled service opportunity may harm reputation of organization.</li> <li>• Project preparation can be time-consuming, may require considerable upfront support.</li> <li>• If an internship, may require supervisor with same training background.</li> <li>• May be a “cover” for a job search. If unemployed and finds a job, may leave volunteer assignment unfinished.</li> </ul> <p><b>Liability:</b></p> <ul style="list-style-type: none"> <li>• Dependent on service project; investigate need for appropriate background check.</li> </ul>
	<b>Long-term Ongoing</b>	<p><b>Opportunities:</b></p> <ul style="list-style-type: none"> <li>• Strong mission-based, consequential outcomes likely.</li> <li>• Worthy addition to agency database.</li> <li>• Mechanisms for volunteer input strongly recommended.</li> <li>• Capable, informed advocates for organization.</li> </ul> <p><b>Challenges:</b></p> <ul style="list-style-type: none"> <li>• Volunteers may become ‘over-invested’ in work of organization and make demands.</li> <li>• Effective implementation time-consuming.</li> <li>• Ongoing oversight important; dedicated volunteer management staff recommended.</li> <li>• Staff buy-in essential.</li> <li>• Volunteers need to be given a voice in organization’s operations that affect them, informed of important changes, and updated on progress on key objectives.</li> </ul> <p><b>Liability:</b></p> <ul style="list-style-type: none"> <li>• Check requirements for appropriate background checks. Should be performed if volunteer works with vulnerable clients.</li> <li>• Should carry some form of liability policy.</li> <li>• May need to offer mileage or other forms of expense reimbursement.</li> </ul>	<p><b>Opportunities:</b></p> <ul style="list-style-type: none"> <li>• High performer eager to further organization’s work.</li> <li>• Brings critical skill set to meet agency’s needs.</li> <li>• Strong representative in the community, likely to be an able advocate.</li> <li>• May prove to be an able recruiter, “buddy” or orientation leader for new volunteers.</li> <li>• May be an early retiree eager to be meaningfully involved.</li> <li>• If not on the board, may be considered for board position.</li> </ul> <p><b>Challenges:</b></p> <ul style="list-style-type: none"> <li>• Volunteer may need care and attention including dedicated workstation and computer and direct line to COO/ED.</li> <li>• Other staff and volunteers must be knowledgeable about this person’s role and open to engaging this person in deliberations that will affect the given area of work.</li> <li>• Generally speaking, there are more volunteers eager for these types of assignments than there are nonprofits ready to engage them.</li> <li>• May perceive that he/she can ‘fix’ the agency.</li> </ul> <p><b>Liability:</b></p> <ul style="list-style-type: none"> <li>• If behaviors prove problematic, may require formal honor and retirement to move individual out of service.</li> <li>• Should strongly consider Directors and Officers Insurance.</li> </ul>

while, a volunteer may need to be dismissed. (*Yes, volunteers can be fired!*)

As with staff, this situation is never pleasant, in spite of its periodic necessity. Some excellent online resources provide detailed information about the process of dismissing volunteers (Rehnborg, 2005; McCurley, 1993). They are available online at:

<http://www.serviceleader.org/new/managers/2005/07/000270.php>

<http://www.casanet.org/program-management/volunteer-manage/fire.htm>

Problem volunteers should not be tolerated, nor should the prospects of this problem deter you from engaging volunteers in the first place. Many situations where volunteers stray from expected protocol are motivated more by ignorance than intent. In the process of gathering the information that appears in this Guide, an executive director told of a situation where her nonprofit organization accidentally “inherited” the problem volunteer of a sister agency. When the aberrant behaviors commenced at the new agency, the ED brought the volunteer in to discuss the situation. The genuinely shocked volunteer had mistakenly assumed that her behavior was what was expected, and she was mortified to learn that she had been such a cause for concern. The woman grew to become one of the new agency’s most critical supporters and strongest workers—not its greatest nemesis. Yes, volunteers can be dismissed, but volunteers also need to receive the courtesy of attention and redirection before drastic measures are taken.

### **Volunteer/Staff Ratios**

There are no specific rules of thumb that determine a standard volunteer/staff ratio, or that trigger when a volunteer manager needs to go from a half-time to a full-time position. Likewise, volunteer hours are not a good proxy to develop equations translating part-time volunteer positions to full-time-equivalent standards for supervision formulas. Working with 8 volunteers each giving 5 hours of service weekly (40 hours of total service per week) is significantly more time intensive from a supervision standpoint than working with a single individual providing an equal amount of time.

We do know, however, that more intensive volunteer expectations require greater staff support and closer supervision. For example, the Court Appointed Special Advocate program standards specify one supervisor to 30 volunteers (National CASA Association, 2006). For supervision purposes, the San Francisco Recreation and Park Department Volunteer Policy Guide recommends one gardener to 15 volunteers (SFRPD, n.d.). Neither number, however, indicates the staffing comple-

ment of the volunteer office that recruits and prepares these people for service. Each organization must examine its own goals, activities, and workload in volunteer engagement and decide accordingly about volunteer management staffing. Benchmarking your program with others in similar areas of service may also provide insight about appropriate staffing levels and expectations.

### **Volunteer/Staff Relations**

Almost any new or changed undertaking naturally gets met with resistance. If you dramatically ramp up your community engagement program, staff are likely to raise concerns about already overwhelming workloads, job security, the qualifications of the volunteers, the timing of your decision, or roles that community members may assume. If you have followed the steps outlined in this Guide, you will have handled many of these issues as you engaged your staff in a shared planning process. A few additional pointers may also help you over this hurdle.

- If you have not done so already, form a committee of staff and other stakeholders to assist with planning and implementation of the community engagement initiative. Your willingness to listen carefully to the demands of your existing personnel will go a long way in developing their receptivity to the new venture. You will need to carefully consider if all of their concerns are founded, but certainly those that are need to be addressed during the planning process.
- Generally, people working in the service sector are active volunteers themselves. Help your staff consider the service they have performed, and relate their experiences as a volunteer to their work as staff who will now interact with volunteers. None of us wants our time wasted, nor are we eager to be treated poorly. Personalizing the volunteer experience helps staff to regard your new workforce positively.
- Orient your staff to your expectations just as you would orient volunteers to your organization. If



you are serious about this undertaking, you need to make that clear. Not only should staff be expected to work within the guidelines of appropriate expectations, but also they should be rewarded for doing so. When recognizing volunteers, thank the staff who supported them, too. Connect merit raises and the other bonuses to this expectation, as you would to other job requirements.

- And finally, inform staff about the expectations and reality of the volunteer workforce. The vast majority of people offering to serve are eager to help—they are not there to take jobs or to assume 40-hour-a-week responsibilities. Provide staff with an update on who is volunteering, as well as how they can become valued members of your organization's team.

For additional resources on this topic check out:  
<http://www.energizeinc.com/art/subj/emp.html>.



## Concluding Thoughts: Volunteers at the Forefront

Organizations benefit from expanding their conceptualization of volunteering to examine the complex interplay between the needs and goals of the organization or cause being served and the concerns and expectations of the people potentially delivering service. Organized on the dual axes of time and connection to service, The Volunteer Involvement Framework™ highlights the complexity as well as the richness of volunteers as a resource.

Using the Framework, one can envision relations with a diverse array of potential volunteers: people who share the same broad goal—to make a difference—but see it from a number of distinct individual perspectives. As demonstrated here, making a difference can occur when one serves a cause he or she believes in, offers a valued skill, and/or acts as part of a network that holds some personal significance.

Responding to volunteers' specialized perspectives not only leads to more meaningful experiences for the volunteer but also creates opportunities for you, as a nonprofit leader. Capitalizing on volunteer resources, even those generated through short-term contacts such as “days of caring” events, can later lead to a cadre of community supporters—people who know about your organization, value the services you provide, and potentially commit to supporting your mission in an ongoing way. By maximizing even brief encounters, you can build mailing lists, tell your story, recruit one-time helpers to offer more in-depth service, and meet new contacts in key organizations for collaboration. However, none of this will occur without consciously segmenting your volunteer contacts, planning for effective volunteer engagement, providing resources to ensure positive volunteer involvement, and targeting volunteer audiences to build support for your organization.

As a nonprofit decision-maker, you will want to consider the options the Framework presents when planning for volunteer engagement, noting not only the opportunities for volunteer support but also the various management expectations associated with service in each of the four quadrants. In addition, you will want to capture sufficient information about your community participants to understand all of the ways in which they might be available and willing to support your organization.

No framework, regardless of how thoroughly conceptualized, is a substitute for getting to know the unique needs and concerns of



each volunteer. A highly skilled, powerful business executive may want nothing more than to plant flowers that beautify an urban area or volunteer with his dog, visiting seniors in a nursing home. Likewise, an arborist may relish the opportunity to create a database for your organization and use a skill set only marginally connected to her workplace. Just as your wants and needs vary over time, so, too, do those of volunteers. Respecting the time and service interest of volunteers turns community members into partners jointly committed to your organization's success.

Appendix A

**Worksheet: Assessing Current Patterns of Volunteer Engagement**

Utilize the grid below, first to capture the ways in which you currently engage volunteers in your organization (remember to include your board of directors<sup>1</sup> in this

diagram). Next, fill in the grid with your ideas for how you might engage volunteers in your organization’s future work.

		<b>The Volunteer Involvement Framework™</b>	
		← CONNECTION TO SERVICE →	
		Affiliation Focus	Skill Focus
TIME FOR SERVICE	↑	Episodic	
	↓	Long-term	

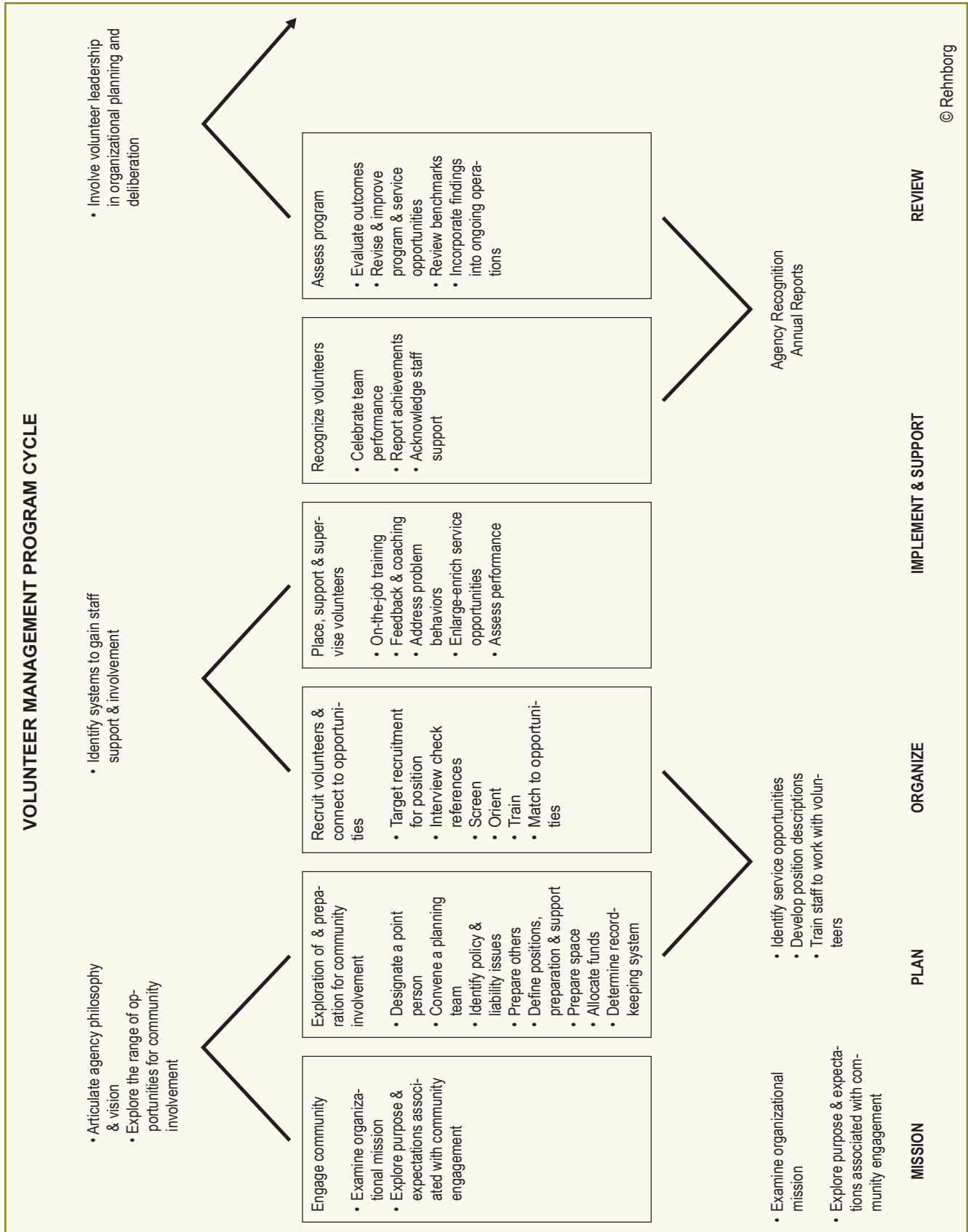
As you assess your current engagement practices take a few minutes to assess the effectiveness of your current situation as well. Where are volunteers most critical to your operations?

How is this part of your system being managed and supported? How effectively does your staff work with your volunteers? What would you like to change, keep the same, or enhance?

1. Members of your board may serve for both the skills they possess as well as their commitment to your cause or organization. You might want to list members by name in the quadrant where they most appropriately belong.

Appendix B

Volunteer Management Program Cycle



### Appendix C

## Questions to Consider When Hiring a Volunteer Manager

*What is the vision for community engagement in your organization? Answers to these questions will help you frame the position, align the work within your agency and set appropriate expectations for the work ahead.*

- Will volunteers play a central role in your service delivery system?
- What objectives will volunteers enable you to meet that would not be met without this workforce?
- What happens to your organization and your ability to meet your objectives without a full- or part-time manager of volunteers?
- What budget are you prepared to allocate to this position? Where will work-space be located for volunteers?
- What office space is available for the director that will be accessible, convenient and allows for a certain amount of privacy? The location you select sends an important message to the community and prospective volunteers.

*Do we have existing staff with the requisite skills, whose time can be freed up to undertake this responsibility?*

- If a staff person with the skills and the personality suited for this job is already available, what responsibilities can be taken away from his/her current work so that he/she can undertake this work? Who can undertake the work this person will no longer be performing?
- If a staff person is capable of taking this on, what will you need to budget for training and professional development to assure that he/she is prepared for the job? What additional compensation will be paid to this person for expanded duties?
- How will you re-introduce this person within the organization? What expectations will you set for other staff members and their work with volunteers?

*Creating a new position within our organization.*

- What will be the expectations and job responsibilities for the new position? See web sites such as <http://www.idealists.org/en/vmrc/index.html> for additional information. Contact your local nonprofit management support center or volunteer center for additional assistance.
- To whom will this person report and why? This should be a relatively senior position within the organization and should report to the executive director or deputy director.
- What skills and talents will you look for in a new hire? Effective volunteer managers generally have exceptional interpersonal and strong management skills.

## Resources about Volunteerism

### Service Leader | [www.serviceleader.org](http://www.serviceleader.org)

Sponsored by the RGK Center for Philanthropy at the University of Texas at Austin, this website provides practical information about all aspects of volunteerism. Special attention is given to best practices about online volunteering; the resource library offers texts and reports on the subject. See also [rgkcenter.org](http://rgkcenter.org)

### Building Better Skills | [www.bettystallings.com](http://www.bettystallings.com)

This website provides innovative ideas and best practice postings as well free training resources and links to sites about volunteerism, fundraising, board development and leadership.

### Charity Channel | [www.charitychannel.com](http://www.charitychannel.com)

Articles, online discussion forums, professional development opportunities, and career search services for professionals in the charitable sector. The site provides teleconferences and on-demand video as well as a directory of consultants, attorneys, accountants, and other advisory professionals who specialize in nonprofit organizations.

### Corporation for National and Community Service | [www.nationalservice.gov](http://www.nationalservice.gov)

A wealth of information on SeniorCorps, AmeriCorps, and Learn and Serve America (the three core national service programs) and their volunteers. In addition, look for information on how to find and engage national service volunteers, what type of national service volunteer is right for your organization, and how to locate national service volunteers in your area. The research section provides numerous studies and data on volunteerism nationally.

### Council for Certification in Volunteer Administration | [www.cvacert.org](http://www.cvacert.org)

The sponsor of the international designation of Certified in Volunteer Administration (CVA) program, this site provides information about the entire certification process. The site also features a comprehensive ethics statement for volunteer administrators as well as the history, mission, and goals of the CVA program.

### Energize, Inc. | [www.energizeinc.com](http://www.energizeinc.com)

A key resource for leaders of volunteers, this web site provides information including volunteer management articles, e-books, links to research and websites. You will also find the latest information on awards, events, courses, conferences, and associations for volunteer leaders, job postings, personal accounts of best practices and a bookstore. Publications referenced in this *Guide* and available through [Energizeinc.com](http://Energizeinc.com) include:

- *From the Top Down*, a guide to volunteer program success that identifies the critical link between the actions of an organizational leader and the overall volunteer program success.
- *Proof Positive*, the basics of a volunteer recordkeeping system: the why and how of application forms, volunteer data files, assignment records, time and activity reports, and proving impact.
- *The (Help!) I-Don't-Have-Enough-Time Guide to Volunteer Management*, a full task analysis of the job of volunteer program manager, including how to build a management team and engage volunteers in the leadership of the program.
- *Children As Volunteers: Preparing for Community Service*, a how-to in engaging volunteers under the age of 14 into an existing adult volunteer program: multi-age teams, designing work, preparing the agency, liaising with schools, and legal issues.

### HandsOn Network | [www.handsonnetwork.org](http://www.handsonnetwork.org)

### Points of Light Institute | [www.pointsoflight.org](http://www.pointsoflight.org)

HandsOn Network of Action Centers provides information on local volunteer opportunities nationwide. The websites of these recently merged organizations provide resources on volunteerism in a number of different settings including business, nonprofits, faith-based and government; and for youth, families and older adults. In collaboration with the Corporation for National and Community Service, the organizations sponsor the National Conference on Volunteering and Service in June of each year.

### Idealist | [www.idealists.org](http://www.idealists.org)

Of special interest is the Volunteer Management Resource Center which includes information about the volunteer management profession, best practices, professional development opportunities, information on 21 specialized volunteer sectors (e.g., Generation X volunteering, family volunteering, faith-based volunteering), and a list of support networks for volunteer managers.

### Nonprofit Risk Management Center | [www.nonprofitrisk.org](http://www.nonprofitrisk.org)

Offers consulting services, staff and volunteer training, online tools, and publications on volunteer risk management. A bi-monthly newsletter, *eNews*, offers quick lessons and highlights timely issues in volunteer risk management. *Risk Management Essentials* is a tri-annual, 16-page newsletter that covers a selection of issues, showcases the Center's training and workshops, and highlights new publications offering risk management advice from a nonprofit perspective.

### **Taproot Foundation | [www.taprootfoundation.org](http://www.taprootfoundation.org)**

The Taproot Foundation strengthens nonprofits by engaging business professionals in service to community needs. Taproot focuses on encouraging pro bono donations of professional services to nonprofit organizations. The Foundation creates systems to facilitate effective connections between nonprofit organizations and the volunteers with the skills to meet the specific needs of requesting organizations.

### **Volunteer Match | [www.volunteermatch.org](http://www.volunteermatch.org)**

A free web interface for nonprofits to post information about their organizations and volunteer opportunities nationwide. The organization also offers consulting services and the Learning Center provides webinars on how to use the website, new tools for recruiting online, and a special series on Boomer volunteer engagement.

### **VolunteerSpot | [www.volunteerspot.com](http://www.volunteerspot.com)**

A powerful volunteer coordinating tool for grassroots organizations, community groups and volunteer lead committees. This free tool provides calendaring, reminders, and other scheduling assistance and reminds volunteers of their obligations.

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## About the RGK Center for Philanthropy and Community Service

Located at the Lyndon Baines Johnson School of Public Affairs, the RGK Center for Philanthropy and Community Service serves The University of Texas at Austin and beyond. With a mission of building knowledge about nonprofit organizations, philanthropy, and volunteerism, the RGK Center prepares students and practitioners to make effective contributions to their communities.

### Education

Through class instruction and leadership training, the RGK Center helps prepare students and shape practitioners for effective nonprofit service. Key educational initiatives include:

- **Portfolio Program in Nonprofit Studies:** UT graduate students prepare for work in the nonprofit sector through concentrated study in nonprofit management, volunteerism, and philanthropy leading to a graduate Certificate in Nonprofit Studies.
- **Dell Social Innovation Competition:** College students worldwide are challenged to develop innovative plans that tackle pressing social issues while competing for \$50,000 in seed funding for their idea.
- **RGK Summer Doctoral Fellowship Program:** Doctoral students from around the country take part in an intensive four-week seminar culminating in the completion of papers for the RGK Center Working Paper Series.

### Outreach

The RGK Center harnesses innovative ideas and concepts for practical application, speeding growth and improvement in the nonprofit sector. Key outreach initiatives include:

- **Executive Education for Nonprofit Leaders:** Nonprofit leaders benefit from residential learning opportunities where expert faculty help think about their work in new and productive ways.
- **Consulting Services:** The RGK Center partners with nonprofit and public sector partners requiring extensive research and analysis such as program evaluations, needs assessments, marketing studies, and more.
- **Frances Moody Newman Distinguished Lecture Series:** This public lecture series explores how the personal values, motivations, and experiences of leading philanthropists shape the mission and method of their giving.

### Research

RGK Center faculty make critical contributions to the study of philanthropy, nonprofit management, volunteerism and global civil society. The RGK Center studies the policies and practices that shape the nonprofit sector, and contributes to national and international debates about the future of the sector. RGK Center initiatives emphasize collaborative approaches and international perspectives in order to foster research and dialogue across fields and borders.

For more information about the RGK Center, or to inquire about a service that may be of interest to you or your organization, please visit our website at [www.rgkcenter.org](http://www.rgkcenter.org), or email [volunteer@rgkcenter.org](mailto:volunteer@rgkcenter.org).







**OneStar Foundation: Texas Center for Social Impact** was established by executive order of the Governor and is tasked with bringing together under one roof: nonprofit capacity building, service and volunteerism, research and evaluation and social innovation. OneStar's vision is to transform both the role of government and the general societal approach to resolving social problems to the benefit of all Texans.

**Economic Impact of the Nonprofit Sector in Texas:**  
The nonprofit sector employs more than 385,000 - exceeding the total payroll for Texas State government - providing almost \$13 billion in wages annually.

FY '08, total contracts with nonprofits across the five Health and Human Service agencies: \$6.1 billion

State government's mission would be incapacitated without the nonprofit sector. OneStar is uniquely positioned as a supporting nonprofit of the Office of the Governor, to champion the strengthening of the social sector as a public purpose. We work with state agencies, nonprofits, universities, corporations and foundations, to promote and facilitate transforming change within the social sector - focusing on increased results for greater impact to benefit those served by the nonprofit sector. To this end OneStar promotes:

- Innovative partnerships
- Entrepreneurial nonprofit business models
- Well-managed volunteer programs
- Research and rigorous evaluation
- Sound business practices
- Nonprofit leadership

OneStar also serves as the state's National Service Commission administering approximately \$10M+ annually through the AmeriCorps grant program and serves as the Faith-Based and Community Initiative office. Texas is the first state to focus an entire AmeriCorps portfolio ('09-'12) on a single issue, education, as a strategy to showcase the power of national service to impact areas of critical need.

#### Since 2006 OneStar:

- Worked with over 4,300 nonprofit leaders to improve business practices and accountability.

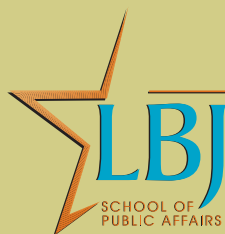
- Became a recognized resource to state agencies, providing targeted technical assistance to improve financial and programmatic performance of select nonprofits contracting with the state.
- Partnered with University of Texas' RGK Center for Philanthropy and Community Service to develop a Strategic Management Program for nonprofit executives and board members around critical leadership issues and effective management.
- In response to the need for innovative succession management and knowledge transfer solutions due to the aging out of the leadership within the nonprofit sector, OneStar partnered with the Bush School of Government and Public Service at Texas A&M, to develop an intense one week residential program for Emerging Leaders. The University is committed to continuing this program.
- OneStar promotes and facilitates Leader Circles around the state as collaborative learning networks where nonprofit executives discuss common challenges, exchange ideas and share solutions.
- One Star hosts the Governor's Nonprofit Leadership Conference annually for hundreds of nonprofit employees, national service members, state agency volunteer leaders and foundation representatives. The '09 conference will highlight social innovation and corporate professional pro-bono volunteering.
- OneStar administers TCC Group's Core Capacity Assessment Tool (CCAT), one of the most comprehensive online survey tools of its kind which allows for anonymous, confidential self-assessment of an organization's core capacities in the areas of adaptability, leadership, management, technical capacities and organizational culture, then provides targeted technical assistance to select nonprofits.

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Printed through the generous support  
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