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# Have You Ever Considered . . . Five Alternative Ways to Build a Volunteer Project

Sarah Schmidt, PhD

## INTRODUCTION

In 1991 the Bar Ilan Brookdale Program of the University of Bar Ilan in Ramat Gan, Israel, and the Jerusalem-based JDC-Brookdale Institute of Gerontology and Human Development commissioned Norman Steigman and this author to write a manual for professional managers of volunteer services on how to best involve volunteers aged 60 and over. As part of the research for this project the researchers spent a year traveling the length and breadth of Israel, visiting close to 80 volunteer projects and interviewing some 300 coordinators of volunteer services, users of those services (e.g., senior hospital nurses and army base commanders), and volunteers themselves.

Upon evaluation, the researchers began to discover patterns in the way volunteer managers tended to build projects, and realized that there were five models, appropriate in different circumstances according to client, volunteer and institutional needs, that could be identified.

### Five Ways to Build a Volunteer Project

- Do-It-Yourself
- One-Plus-Ten
- One-Plus-One
- Activist Cadre
- The Agent Runner

Though these models reflect experience emanating from field work in Israel, the researchers believe that they are widely applicable in other settings and that experienced coordinators will be able to adapt them to their own management styles,

once they understand each model's basic components.

## DO-IT-YOURSELF

The most common model is what we have called the Do-It-Yourself, in which the volunteer manager takes a hands-on role in managing the volunteers and is responsible for all their affairs—recruiting, training, ongoing supervision, rewards. There is little, if any, direct interaction between the volunteers and other professionals or employees within the institution (nurses, orderlies), who tend to see the volunteers as just another element in the manpower available to them, one with little status and generally no input into their working conditions.

In the Do-It-Yourself model, the volunteer coordinator him- or herself is the user of the volunteer services. In its most common version the coordinator's focus is on representing the mission of the institution or organization by providing services to clients, and much time is spent mediating problems that arise, either between the volunteers and the clients or between the volunteers and other professionals and employees within the institution. Training and supervision are informal and irregular, and the coordinator generally functions as an administrator, even though he or she may have a social work or teaching background.

A good example of this was in a well-known old age home in Jerusalem, where volunteers mainly help in patient feeding and escort. Because of its location and rep-

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utation, there is no shortage of potential volunteer candidates and the coordinator does not need to worry about recruitment. Nor does the institution plan for the use of volunteers as an integrated part of the services it provides and none of its departments are dependent on them (though there would be a serious loss of manpower if they did not arrive). Instead, volunteers are perceived as a welcome "windfall," who need no training for what is generally unskilled and repetitious work, a form of cheap labor who need have little choice in how they are deployed. Emphasis is placed on retaining the volunteers and tying them to the Home—by making them feel welcome, by thanking them, by giving them small gifts and holding celebrations at festival times, by providing bus fare, by allowing them to participate in activities of the home.

In a second version of Do-It-Yourself, the volunteer manager understands that, in fact, he or she has a dual clientele—the volunteers themselves as well as the nominal clients. The manager, therefore, expands the services and rewards available to the volunteers by providing training and some form of ongoing and formal supervision and by taking the volunteer's needs and interests into account before placement—even, on occasion, designing a job to suit the volunteer's skills (assuming it fits, also, the needs of the institution). For example, one manager asked a volunteer who had a special interest in physical fitness to help improve the coordination of stroke damaged patients in a geriatric institution by using a large ball to "play catch" with them on a regular basis.

#### *Pros and Cons*

Volunteer coordinators often seem to use the Do-It-Yourself model because this is what the workplace has been conditioned to expect, because they haven't been trained to do otherwise, and because they don't realize there may be alternative ways to use volunteer services and build volunteer projects.

Both versions of the Do-It-Yourself model build on the low expectations of all parties—the volunteer manager, the institution and its employees, and the volunteers themselves. It is assumed that the institution's need for minimal investment in an alternative form of inexpensive labor comes first. It is also assumed that the need to volunteer is so strong (particularly after retirement) that volunteers will be willing to accept less than ideal conditions and fewer satisfactions than might be available if more effort was invested in their needs. And, indeed, in many cases these assumptions are valid.

But often they are not. Not infrequently, without stating the real reasons for doing so, volunteers act on their frustrations or dissatisfactions by dropping out. The "physical fitness" volunteer mentioned above was on the verge of doing so, mainly because the volunteer coordinator had never explained his role to the ward personnel who, therefore, related to him with hostility when he disrupted their routines. In other cases, volunteers react to low expectations and to their understanding of little potential for future personal development by doing less, with less enthusiasm, than otherwise would be so. The organization expends relatively little thought on its volunteer program—but the return is commensurately low. Are there alternatives?

#### ONE-PLUS-ONE MODEL

In the One-Plus-One model the volunteer manager pairs one professional with one volunteer, so that they form a team working together to meet the client need. The researchers found instances of this model in the *Sav-Gan* (grandparent-kindergarten) project, where older volunteers help kindergarten teachers by performing a range of mutually-defined "grandparental" roles within the classroom and playground setting; within the Volunteer Unit of the City of Tel Aviv, where volunteer teacher's aides work directly under

the supervision of a teacher who has requested help; in the Social Services Department of the Jerusalem Municipality, where volunteer case aides are paired with social workers who welcome their paraprofessional contribution towards lightening case loads; and as part of a nationwide police project, where one volunteer teams with one policeman on patrol car duty, thus freeing up police time and allowing overworked police personnel to take advantage of accrued leave and vacation time.

### *Appropriate Use*

The One-Plus-One model is most appropriately used when the volunteer manager can identify a professional who needs some sort of assistance and when that need is one that a volunteer, albeit often after extensive training, can fill. The heart of the model is the chemistry that develops between the volunteer and the professional with whom he is paired; though, in general, it is a good idea for volunteers to have clear and defined job descriptions, in this model the relationship tends to develop as it goes along. Both the volunteer and the professional need to feel confident that the extra dimension the volunteer can add (building shelves for the kindergarten; calming the neighbors as the policeman investigates the complaint; playing word games with the unruly pupil while the teacher gets on with the lesson) will be of ultimate benefit to the professional, even as it provides job enrichment and enhanced status to the volunteer.

Only rarely in the One-Plus-One model does the volunteer manager personally arrange the pairings. Instead, the manager works closely with a professional within the framework in which the volunteer is to be placed, or chooses an appropriate "senior" volunteer, either of whom take on the role of matchmaker and provide ongoing follow-up. In each district within the police department, for example, the officer in charge of the pa-

trol car force has been delegated to make the volunteer-patrolman pairings, since his experience, status and professional understanding are crucial in order to bring together two personalities who can work with the needed sense of trust and mutual respect. On the other hand, the professional coordinator responsible for the *Sav-Gan* project in the town of Raanana identified a volunteer who could be her matchmaker, in this instance a recently-retired kindergarten teacher who was looking for an opportunity to use well-developed career skills and her knowledge of the kindergarten system in a new and different way.

Of course, as in any ongoing relationship, the expectations of both parties of the professional-volunteer team need to be clarified and coordinated on a periodic basis. As trust and mutual respect develop, the partners are often anxious to work together to renegotiate the volunteer's responsibilities. Central to this renegotiation, as well as to the model's success in general, are the personality and role of the matchmaker, who must continue to keep in touch with and maintain the confidence of both parties, to ensure that their needs are being met and to smooth out whatever misunderstandings may develop.

### *Pros and Cons*

How does this model help the professional volunteer manager? Because one-on-one pairing is so labor-intensive, very few professionals have the time to build and maintain ongoing contact with projects of this type. By using someone who has professional insight into the needs of the professional partner as a matchmaker, and by working with and through him, the manager is able to get a bigger return for the investment of time, in terms of the numbers of projects that can be built, the range of jobs that can be offered and, ultimately, in the numbers of volunteers who can be placed. However, because the model is also highly skill- and trust-inten-

sive, if something goes wrong (the matchmaker proves inadequate or unreliable, the professional has trouble delegating to the matchmaker), the project may be difficult to initiate and/or can fail to develop.

In its use of the matchmaker-deputy, the One-Plus-One model can be considered a variation of another model encountered in a range of settings.

#### THE AGENT RUNNER MODEL

Often professional volunteer managers are charged with the responsibility of setting up a number of projects to meet the needs of different clients, but find that they do not have the time for necessary follow-up and supervision on a day-to-day basis. In the Agent Runner model, the professional finds a deputy—an agent—who is trained and then relied upon to take on the ongoing management of one discrete project. The agent can be either a volunteer who is looking for management responsibilities or a paid employee within a particular institution where the volunteer project has been set up. In both instances, however, the role of the professional is to support the agent by supplying whatever is needed to make the project successful, for example, training and rewards for the volunteers, or crisis intervention when appropriate.

Here are two examples of the Agent Runner model:

1. For the past decade a group of 15–20 elderly volunteers has been providing a light mid-morning meal to some 150 outpatients who come daily to Israel's largest rehabilitative facility. The project began after the volunteer manager, a local employee of Israel's national Department of Welfare Services, identified a well-known neighborhood leadership personality willing to coordinate the project and to recruit additional volunteers from her acquaintances at the local pensioners' club. Today this same leader continues to act as liaison between the group, the hospital and the Welfare Services. In fact, motivated both by her personal satisfaction and the community recognition she has received, she has expanded

her role (negotiating extra food for the rehabilitees; soliciting funding from the local Rotary Club to subsidize trips for the volunteer group) so that the professional needs to have only minimal contact with the other volunteers.

2. At a large army base in the center of Israel, about 90 volunteers, 10–20 per day, repack food, which the army receives in bulk, into smaller quantities for distribution to temporary army quarters and front-line positions. Volunteer recruitment and placement are done via the professional in the nearest town's Department of Welfare Services. But the project itself is managed on an ongoing basis by an army officer, who is responsible for providing transportation to and from the base, making available to the volunteers a mid-morning meal in the army canteen, giving on-the-job training in the use of specialized machines—as well as occasionally bringing in the base commander to give the volunteers a special sense of being needed and appreciated. The professional volunteer coordinator keeps in touch with her army officer "agent" and sees to it that the volunteers are invited to special events sponsored by the Department of Welfare Services—but the use of this model frees her from involvement in the day-to-day details of project management.

#### *Important Elements*

What are the elements that make for successful use of the Agent Runner model? In the first place, the professional volunteer manager needs to be able to let go, to delegate to someone else and trust that he will be able to do his work in an acceptable fashion. This means, of course, that the manager has the skills and contacts to make a careful selection of someone who, in essence, will be acting as a proxy, someone who will be enthusiastic enough about the project to give it proper time and attention, with whom he or she can get along and who will respect the manager's professional skills as well as commitment to voluntarism.

Once the agent is chosen, the professional has to be willing to energize and support him; to provide a sense that his project is part of a greater whole (for ex-

ample, part of the Welfare Services system, or part of the hospital volunteer unit); to help providing rewards to the volunteers; to provide training, if needed; to be available in times of crisis. Lest control be lost, the professional also needs to maintain an ongoing interest in the project, to be certain that standards are maintained and that the volunteers' needs are continuing to be appropriately met.

### *Pros and Cons*

A factor inherent in the smooth operation of the Agent Runner model is the willingness on the part of the volunteers to accept a proxy in place of the professional manager. This can sometimes be tricky, for it requires that the professional give the volunteers the sense that they can have direct access, even though he or she knows that the plan is, via use of an "agent," to have less ongoing contact with them. The key is to choose an agent who will know how to win the support and trust of the volunteers, in much the same way that the professional and the agent need to win the support and trust of each other.

Though the Agent Runner model is a tempting one to use, particularly when there is pressure to build a great number of projects, the manager of volunteer services should be aware of potential pitfalls. Some include:

- The agent gets sick (not infrequent among older volunteers) or leaves his job (always a possibility with professionals like army officers) or moves, and it is hard to find an appropriate replacement;
- Situations similar to those described above in which a replacement is found—but the group cannot adjust to the new personality;
- The agent does something unacceptable to the professional and refuses to accept her authority in the matter;
- The professional becomes aware of the fact that there is a large volunteer dropout and feels that the agent may be responsible (e.g., by putting unfair pressure on the volunteers);

- The professional would like to "fire" the agent, whose work she no longer feels is acceptable, but the volunteer group supports its leader;
- Competition develops and a member of the volunteer group challenges the leader-agent's position.

Each of these instances calls for a re-evaluation of the use of this model for the specific project involved, in terms of its cost-benefit to the professional coordinator. Perhaps the coordinator has built an adequate number of projects and would like, at least for the time being, to resume direct contact with volunteers by taking on the hands-on management of the project. Perhaps additional training, or more close supervision, can help the agent to do a better job. Perhaps an honorary position for the agent can be created, encouraging him or her to "retire" in a way that satisfies the group's need to respect their leader. Perhaps another project for the competitor/challenger to manage can be found. Or perhaps the professional has to look at an alternative way to restructure the project.

### THE ONE-PLUS-TEN MODEL

In the One-Plus-Ten model, which often seems to work best in a professional setting, the volunteer manager analyzes a task occupying many paid workers into the components that must be done by a certified professional and the components that, perhaps with some training, could be done by volunteers under professional supervision only. The manager then locates an appropriate professional (the One) who is willing to work with a team of volunteers (the Ten) and sets up a volunteer project which provides the same service to the client that was previously provided by the group of paid workers.

This model was first identified when the researchers visited a large Jerusalem hospital and were told about the way patients were processed on entering the hospital for elective procedures. Fifteen vol-

unteers (3–4 a day), under the supervision of one senior nurse, take care of all non-financial hospital intake procedures in one self-contained unit. Volunteers open patient files, weigh patients, do EKGs, assist the nurse in performing other tests, register results, and then serve a light breakfast before accompanying the patient to his ward. A technician explains the use of the EKG machine in two simple lessons; other procedures are learned on the job.

A less technical example of the One-Plus-Ten model was in the seaside town of Netanya, where a group of some twenty volunteers, under the supervision of a retired geriatric social worker, ran a weekly lunch club for 60–70 isolated/depressed people who otherwise would hardly leave their homes. The retired professional initiated the project by negotiating the source of meals and a place to meet; now she serves as coordinator/troubleshooter. A group that she recruited (many of them acquaintances from the same synagogue) heat and serve the lunch and a hot drink, wash dishes and clean the kitchen, plan and direct entertainment (bingo, live music).

#### *Pros and Cons*

It is relatively easy to market the One-Plus-Ten model to an institution which can appreciate the savings inherent in maximizing the time and effectiveness of its professional by using a volunteer support staff. The model also is an easy one in which to place volunteers who want to do something special within a larger institutional setting. Experience suggests, however, that many volunteer managers have difficulty conceptualizing and recognizing the opportunity for implementing it. Perhaps it would be helpful to note that it works most effectively when the professional can do the things he or she considers most professional and yet can keep control over the simpler work that the volunteers are doing. It is also best if the project's activities all can be performed in one place.

Once the volunteer manager has identified a project in which the model can be effective, and has broken it down into its component parts, the One-Plus-Ten model will be found to have many advantages. In an institutional setting:

- It takes paraprofessional jobs away from possibly over-qualified professionals and gives them to volunteers who are happy to have relatively skilled and responsible work;
- It uses the skills of the professional in a wide-ranging way, while at the same time it gives the volunteers more status and teaches them new skills;
- It encourages a positive relationship between the professional and the volunteers, since both are investing efforts by working together to achieve the same goal;
- It stimulates the formation of a mutual support and friendship group among the volunteers by giving them work in a project that has a distinct identity.

If there are several such projects within the same institution both the professionals and the volunteers can have contact with others like themselves, useful for idea sharing and problem solving. And even in a non-institutional setting some of the same advantages, like group support and project identity, are relatively easy to achieve with the One-Plus-Ten model.

Yet it is also important to be aware of this model's potential difficulties. The volunteer manager may be frustrated in efforts to find a professional who is willing to work primarily with volunteers, something that may isolate that professional from colleagues. The professional must be willing to learn how to deal with volunteers and the volunteer manager must find the time, and have the ability, to do the teaching. Unions may object to giving paraprofessional roles to volunteers. Administrators of institutions, despite the model's money-saving potential, might object to the volunteer manager's proposal that long-standing procedures could be conducted in a different way.



It is preferable, therefore, that this model be introduced gradually within any one institutional setting, and that the volunteer manager monitor it carefully to ensure a reasonable chance of success and subsequent replication. A good way to implement the One-Plus-Ten model outside a professional setting is to be on the lookout for a volunteer entrepreneur, one who wishes to set up a project of her own (as in the second example above), to suggest it in appropriate instances, and then be available to help in the early stages.

In fact, identifying a volunteer entrepreneur and suggesting a model for project building is often the most efficient way for a volunteer manager to conserve time and energy. Depending on the service the volunteer group wishes to provide and the needs, skills, and potential time commitment of the volunteer entrepreneur, the One-Plus-Ten model may be the most appropriate. But there is another option, one which we have seen successfully implemented in a range of volunteer frameworks.

#### THE ACTIVIST CADRE MODEL

The Activist Cadre model is particularly appropriate for a project that mainly requires a great deal of routine chore work in order to serve the needs of a great many clients. Structurally it is based on the concept of two concentric circles. In the inner circle is a small group, the Activist Cadre, consisting of the volunteer entrepreneur and a few people with whom he feels comfortable and who are willing to devote to him, and to his project, a great deal of time and energy. The outer circle consists of many more people, who want the opportunity for some volunteer activity, but who wish to invest only a limited amount of their time/brains/skills/commitment.

A project with which many volunteer managers are familiar is "Meals on Wheels." Here is the way the researchers found one such project, using the Activist

Cadre model in a widespread rural area, to be organized:

Ninety volunteers, who work one or two three-hour shifts per week, are divided into ten delivery routes. These volunteers pack into portable containers meals that already have been prepared at a school kitchen; then, in volunteer-owned and driven cars, they deliver two meals on each of two days in the week to some 100 clients referred by the municipality's Social Welfare Department. A core group of about ten people takes care of all the more time-consuming administrative tasks, such as drawing up the car routes, preparing special meal requests, maintaining a work rota, keeping accurate records, liaison with the school and the Social Welfare Department.

This is a good example of how the Activist Cadre model permits the building of a large-scale project, providing a service to many clients, even as it meets the needs of two groups of volunteers: those who can do only minimal work but want to feel part of a larger enterprise, and those who are looking for serious work and a more full-time involvement.

The Activist Cadre structure has shown itself to be flexible. In an urban setting (Jerusalem) the retired director of the ambulance services built a volunteer project which monitors daily, via the telephone, the condition of some 1,200 elderly chronically sick people who, for the most part, live alone—and he is still adding subscribers to this free service. This volunteer entrepreneur has succeeded by relying on a group of long-time professional and army contacts, who work with him on an almost full-time basis, handling administration and documentation details and recruiting and supporting the more than 100 "line" volunteers, who work one morning or afternoon shift each week answering the client phone-in calls.

#### *Pros and Cons*

There are two ways the Activist Cadre model can be built. The volunteer man-

ager can first identify the entrepreneurial figure who is looking for a project to found and manage and who is willing to recruit the group that will become the cadre. Alternatively, the volunteer manager can recruit the cadre as a group (from a pensioners' club, a church or synagogue, a service organization) and encourage the development of one or more leadership personalities. In both instances, however, the leader must have the energy and charisma to motivate other people and the cadre must be composed of people with administrative skills who are looking for something useful to do.

Generally, in this model, the cadre has the additional reward of becoming a strong friendship and support group. Sometimes this can cause problems, for example when the friendship group ages and the volunteer manager is called upon to reinforce it with new and younger members. Too, the cadre as a friendship group may be adequate up to a certain level of expansion, but then may be faced with the issue of formalizing what until then had been a relatively casual style of operation. One volunteer organization with which the researchers have worked, dedicated to helping absorb the flow of new Russian immigrants into Israel, responded to this situation by consciously deciding to limit its activities so that the spontaneity of interaction among the core group members might be preserved. Thus, though the Activist Cadre model tends to demand little of the volunteer

manager when things are going well, he or she must maintain enough contact with the project to detect, or even anticipate, potential strains and move to counteract them.

## CONCLUSION

Building a volunteer project can be a demanding and time-consuming task. It is only natural that day-to-day calls on the volunteer manager's energies can make it difficult to think through the ways in which client services can be maintained, and enhanced, by the use of alternative project designs.

This article has suggested a number of models that have worked well, often for ten or more years, with an indication of the components that make each one's success more likely. Though they are derived from the Israeli setting, it appears that their application can be universal, for all over the world there exist the possibilities inherent in mobilizing volunteer energies to address human needs.

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The author wishes to thank Norman Steigman, who was a full partner in conceptualizing these project models, and both the Bar-Ilan Brookdale Program of the University of Bar-Ilan and the JDC-Brookdale Institute of Gerontology and Human Development in Israel, which jointly funded the research upon which the models are based.

## ABSTRACT

*Older women are increasing in number and are the gender who most often volunteer. Thus, an increasing pool of older women volunteers may be forthcoming. Keeping these women satisfied can serve them and the people they serve. The 119 women in this study range in age from 60 to 93, are racially diverse, and are most often low-to-middle income. For these women, volunteer satisfaction and retention relate to interaction on the job, recognition for their work, and meeting their own expectations. Methods for meeting these needs are suggested.*

# Older Women Who Volunteer: Tapping a Valuable Woman Resource

Ellen S. Stevens, DSW, ACSW

The 21st century will witness rising numbers of elder adults, and the majority will be women (Atchley, 1991; Hooymann and Kiyak, 1993). Of the elders who provide volunteer service through formal organizations, the majority are women (Garner and Mercer, 1989). Thus, demographic projections and volunteer trends suggest increasing numbers of older women in volunteer roles. By addressing the issues of satisfaction and retention, more older women may find continued usefulness through volunteer work which utilizes their skills and serves the needs of society.

## PURPOSE OF THE STUDY

This article presents characteristics associated with volunteer satisfaction and retention for 119 volunteers who are older women. The work is based on a prior study of 151 volunteers who were both men and women (Stevens, 1989-90). Volunteer administrators and supervisors can utilize these findings to tap the proliferating human resource of older women who choose to volunteer.

## THE RESEARCH PROCEDURE

The volunteers of study were working under the auspices of one senior volunteer organization in the northeastern U.S. They provided information about themselves and their volunteer roles through a 46-item survey which was developed and pretested by this author.

The survey questionnaire was pretested with a representative sample of older volunteers, the majority of whom were women. Reliability for the five items measuring volunteer satisfaction was documented by an inter-item coefficient of .95. Face validity was determined by a three-person panel of gerontological experts consisting of one mental health practitioner, one sociologist, and one nurse administrator. Content validity was established for items measuring "satisfaction," "retention," "socioeconomic status," and "role strain" through comparison with definitions of these concepts in the literature. Criterion validity was upheld for "retention," "age," "marital status," and "gender" by comparing volunteers' responses with other sources of this information.

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Role theory was the basis for the development of study variables. Questionnaire items inquired into qualities of the volunteer role such as "role sanctions," including provisions of transportation, money, and recognition; "role-set interaction;" "role induction;" and "role continuity" in regard to type of work, respect, and enjoyment. Questionnaire items which measure these and other role-related characteristics are identified in Appendix I.

Questions about the women themselves inquire about sociodemographic characteristics such as age, marital status, racial and ethnic identity, and socioeconomic status, including education, occupation, and income. Information about their levels of satisfaction and retention was also collected.

Data were analyzed through frequency distributions of sociodemographic and role characteristics and correlational statistics to determine which characteristics were associated with volunteer retention and satisfaction. Multiple regression analysis was then used to identify the most salient variables.

#### THE WOMEN OF STUDY

The women of study range in age from 60 to 93 years, with the vast majority being in their sixties and seventies (89%). Most are widows (53%). There is a sizable representation of racial and ethnic minorities, including nearly one-fourth who are African-American. The majority are of low to middle socioeconomic status, with over one-fourth reporting less than \$5,000 annual income. Most were formerly, but are not currently, employed (86%). The majority are long-time community residents who have provided service for at least five years (59%) and live within one mile of their volunteer site (55%).

Volunteer satisfaction ranges from relatively low to high, with the largest proportion being "moderately satisfied" (43%). Over 70% of these women have been volunteering for more than one and one-half years; nearly 30% discontinued

service during this time. These characteristics are further detailed in Figure 1.

#### *Characteristics which Contribute to Retention and Satisfaction*

Six qualities of the volunteer and the volunteer role contributed to retention and satisfaction. Role-set interaction, role congruence, role recognition, assistance with transportation, continuity of respect, and pattern of service were each statistically significant. These characteristics are explained below:

**Role-set interaction** refers to the number of agency workers with whom the volunteer had contact. Responses could range from "nobody" to "ten people or more." The women who reported contact with more people reported higher levels of retention and satisfaction.

**Role congruence** refers to similarity between one's expectations and actual experiences on the volunteer job. Response choices ranged from "just like I expected" to "not as I expected." Those who perceived higher degrees of congruence between expectations and experiences tended to perceive higher levels of retention and satisfaction.

**Role recognition** refers to recognition for one's work. This included recognition from the staff of both the volunteer organization and placement agency. Responses ranged from "a lot of recognition" to "no recognition." Receiving a lot of recognition was associated with higher levels of retention and satisfaction.

**Assistance with transportation** was indicated by whether transportation assistance or reimbursement was provided. Responses could be either "yes" or "no." Receiving this assistance was related to satisfaction.

**Continuity of respect** was measured by the perceived similarity in level of respect between past and current work roles. The degree of similarity could range from "a lot alike" to "very different." More similarity in respect was related to more satisfaction.

<b>Age</b>	60 - 69	45.3%	<b>Occupational Identity</b>	Homemaker	27.4%
	70 - 79	44.4%		Skilled Work	20.5%
	80 - 89	9.4%		Clerical Work	17.1%
	90 - 99	.9%		Business	8.5%
	Total	100.0%		Managerial	6.8%
<b>Marital Status</b>	Married	27.4%		Professional	9.4%
	Widowed	53.0%		Other	10.2%
	Divorced	5.1%		Total	100.0%
	Separated	2.6%	<b>Community Residence</b>	Less than ten years	12.1%
	Never Married	12.0%		10 - 20 years	12.9%
	Total	100.0%		20 - 30 years	19.8%
<b>Racial/Ethnic Minority</b>	Black/African	24.6%		More than 30 years	55.2%
	Italian	19.3%		Total	100.0%
	Jewish	17.5%	<b>Pattern of Service</b>	Less than one year	8.7%
	White/Caucasian	16.7%		One to five years	32.2%
	Hispanic	9.6%		Five to ten years	17.4%
	Other	5.3%		More than ten years	41.7%
	Total	100.0%		Total	100.0%
<b>Annual Income</b>	Less than \$5,000	25.2%	<b>Proximity to Site</b>	Less than one mile	54.8%
	\$5,000 - \$9,999	41.7%		One to two miles	20.9%
	\$10,000 - \$14,999	18.4%		Three to five miles	16.5%
	\$15,000 - \$19,999	16.8%		More than five miles	7.8%
	More than \$20,000	7.8%		Total	100.0%
	Total	100.0%	<b>Volunteer Satisfaction</b>	Low Satisfaction	22.0%
<b>Education</b>	Grade school or less	37.4%		Moderate Satisfaction	43.0%
	High school graduate	45.2%		High Satisfaction	35.0%
	College graduate	17.4%		Total	100.0%
	Total	100.0%	<b>Volunteer Retention</b>	Less than 1 1/2 Years	71.0%
<b>Employment Status</b>	Not employed	86.3%		More than 1 1/2 Years	29.0%
	Working part time	9.4%		Total	100.0%
	Working full time	4.3%			
	Total	100.0%			

**Figure 1**  
**Characteristics of the women of study**

**Pattern of service** was measured by the number of years the volunteer had been involved in service to her community. Responses ranged from "less than one year" to "more than ten years." There was a positive relationship between number of years and level of satisfaction. The statistical significance of these findings is reported in Figure 2.

Since several characteristics were significant, multiple regression analysis was employed to identify the most salient characteristics when all were considered. "Role-set interaction" and "role congruence" continued to impact volunteer retention. "Role recognition" and "role congruence" continued to impact volunteer satisfaction. The multiple regression statistics which document these findings are shown in Table 1 and Table 2.

Thus, "role-set interaction," "role recognition," and "role congruence" are salient for tapping this older women resource. Ways to promote opportunities to interact with others on the job, receive recognition for one's work, and meet one's own expectations are suggested in the implications which follow.

<i>Retention</i>	<i>Satisfaction</i>	<i>Retention</i>	<i>Satisfaction</i>
Role-set Interaction	r= .35**	Role-set Interaction	r= .24*
Role Congruence	r=-.28**	Role Congruence	r=-.29**
Role Recognition	r= .22*	Role Recognition	r= .45**
		Transportation	r= .23*
		Pattern of service	r= .18*
		Continuity of respect	r= .22*

\*p≤ .05.    \*\*p≤ .01.

**Figure 2**  
**Statistical significance of characteristics which contribute to retention and satisfaction**

**IMPLICATIONS FOR VOLUNTEER ADMINISTRATORS AND SUPERVISORS**

*Promoting Opportunities for Interaction*

Promoting opportunities for interaction among workers and volunteers can pay off in continued service. Volunteer administrators and supervisors can take the lead in educating staff about volunteers' needs for interaction. Abilities of volunteering women can be communicated directly by the women if opportunity for such is provided. Formal programs which showcase volunteers' talents, as well as opportunities for informal dialogue, can bring volunteers' abilities to light. Once their value is recognized, interaction is likely to follow. Additionally, administrators and supervisors who work with these women as collaborators are role modeling the administrator-volunteer interaction which is being advocated.

*Promoting Opportunities for Recognition*

Receiving recognition from both the volunteer organization and placement agencies is the strongest correlate of satisfaction for the women-of-study.

In addition to formal recognition ceremonies, verbal praise from administrators, along with questions about the volunteers' well-being on the job, are ways to provide recognition. Tangible tokens of appreciation, as well as intangible attention, can be valued forms of remuneration. Soliciting volunteers' input for decision-making, recognizing that older women have had years of valuable experience in family and work roles, can further convey awareness of volunteers' worth.

*Promoting Opportunities to Meet Expectations*

Enabling older women to meet their expectations may begin with inquiring about the type of work they have done and the type of work they wish to do. While some women may want to apply skills acquired through years of work outside or inside the home, others may want change. Interviews prior to placement can be cost-effective in time and money—since meeting expectations can lead to staying on the job. Older women

**Table I**  
**Multiple regression statistics showing impact of "role set interaction" and "role congruence" on volunteer retention**

<i>Variable</i>	<i>R<sup>2</sup></i>	<i>R<sup>2</sup> Change</i>	<i>Beta</i>	<i>Sig T</i>
Role-set interaction F(1,72) = 20.9273, p<.001	.2252		.4638	.0000
Role congruence F(2,71) = 16.3743, p<.001	.3157	.0905	-.3009	.0031

**Table 2**  
**Multiple regression statistics showing impact of "role-recognition"**  
**and "role congruence" on volunteer satisfaction.**

<i>Variable</i>	<i>R<sup>2</sup></i>	<i>R<sup>2</sup> Change</i>	<i>Beta</i>	<i>Sig T</i>
Role recognition F(1,72) = 22.8350, p<.001	.2408		.4231	.0001
Role congruence F(2,71) = 14.2582, p<.001	.2866	.0458	-.2243	.0363

with interpersonal skills who wish to continue working with people may be candidates for conducting pre-placement interviews with other volunteers.

Follow-up interviews which assess whether expectations are being met could lead to desired changes. Periodic collaborations with volunteers to see if expectations are being met can increase the ongoing "fit" between volunteer and volunteer experience.

#### CONCLUSIONS

Current and future resources of older women who volunteer can be tapped for the mutual benefit of seniors and society. Volunteer administrators can educate their workforce about the value of this resource and ways to meet their needs. Recognition of volunteers' worth can be conveyed by soliciting input in decision-making processes. The meeting of expectations may begin prior to placement and continue throughout the placement by joining with volunteers to evaluate their well-being on the job. Through opportu-

nities which enable involvement of self, volunteerism may promote satisfying roles for the burgeoning resource of older women and the betterment of society.

#### ACKNOWLEDGMENT

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**Appendix A**  
**Role Characteristics and Corresponding Questionnaire Items**

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<u>Role Characteristics</u>	<u>Questionnaire Items</u>
Role Sanctions	Does RSVP give you: transportation assistance or reimbursement; insurance; meals; money? (YES / NO) How much <i>recognition</i> do you receive for your work from people you work with; RSVP? (A LOT / SOME / NOT MUCH / NO RECOGNITION) How much <i>criticism</i> do you receive about your work from people you work with; RSVP? (A LOT / SOME / NOT MUCH / NO CRITICISM)
Role Induction	How helpful was the training in preparing you for your volunteer assignment? (EXTREMELY / VERY / SOMEWHAT / NOT HELPFUL / I DID NOT RECEIVE TRAINING)
Role Continuity	Is your volunteer work like the work you did before (on your job or at home) in regard to: type of work; how hard it is; the respect you get; your own enjoyment? (A LOT ALIKE / SOMEWHAT ALIKE / SOMEWHAT DIFFERENT / VERY DIFFERENT)
Role Mobility	If you wanted to change the amount of responsibility you have, either to have more or to have less, how easy would it be to change it? (VERY EASY / SOMEWHAT EASY / SOMEWHAT DIFFICULT / VERY DIFFICULT / DON'T KNOW)
Role Strain	How difficult is your volunteer job in regard to: getting to and from work; getting along with the people; the type of work; the amount of work; meeting job expenses? (EXTREMELY DIFFICULT / VERY DIFFICULT / SOMEWHAT DIFFICULT / NOT DIFFICULT)
Role-set Interaction	Each time you volunteer, how many <i>different agency workers</i> do you have contact with? Include staff, directors, other volunteers, etc. (NOBODY / ONE TO TWO PEOPLE / THREE TO NINE PEOPLE / TEN PEOPLE OR MORE)
Role Congruence	Is your volunteer work like you expected it to be in terms of the type of work you do? (JUST LIKE I EXPECTED / SOMEWHAT LIKE I EXPECTED / NOT MUCH LIKE I EXPECTED / NOT AS I EXPECTED)



## ABSTRACT

*This study explores several key senior volunteerism policy issues that need to be addressed from a local perspective in order to meet the challenges of the twenty-first century. Using inputs from a national survey of Voluntary Action Centers, prominent volunteer agencies in the United States, this study examines the impact of the national economy on senior volunteerism, the status of funding, the relationship between local senior volunteerism and employment, the role of risk management, and the affect of an aging society on senior volunteerism.*

# Senior Volunteerism Policies at the Local Level: Adaptation and Leadership in the 21st Century

Laura B. Wilson, PhD  
Sharon Simson, PhD

## THE ISSUE

Senior volunteerism has played an influential role in the development and provision of services to older persons residing in communities throughout the United States. Senior volunteers have served young and old in a variety of local settings: civic organizations and government, schools, religious institutions, hospitals, the military, and various rural and urban associations. Senior volunteer efforts have been instrumental in facilitating many programs on the local level, including senior centers, nutrition projects, recreational activities, health programs, advocacy and legal efforts (Ellis & Noyes, 1990; U.S. Senate, 1992; Van Til, 1988).

As we enter the twenty-first century, we find that senior volunteerism at the local level is changing. Policies which have guided the development of senior volunteerism in the past are not necessarily applicable in today's society. Local volunteer policies and programs which were developed in conjunction with historical

events must again respond to economic, demographic, and social changes. Senior volunteerism is faced with the challenge of adapting local programs to societal pressures while maintaining a steady course of leadership into the twenty-first century (Independent Sector, 1990; Kershner & Butler, 1988; Wilson, 1990).

The purpose of this study is to explore several key policy questions that need to be addressed from a local perspective in order to meet the challenge of adaptation and leadership in the twenty-first century. Input was sought from local level senior volunteer programs regarding the current and future status of local level volunteerism. The local programs selected for this study were the Voluntary Action Centers, an informal association of prominent national volunteer agencies in the United States.

Key questions to be explored are:

1. What is the impact of the national economy on senior volunteerism at the local level?

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2. What is the status of funding of local senior volunteer programs?
3. What is the relationship between local senior volunteerism and employment?
4. What role does risk management play in local senior volunteerism?
5. How does an aging society affect senior volunteerism on the local level?

This study explores these questions as one step toward developing policies that could prove helpful to local level senior volunteer programs functioning in a constantly changing environment.

## BACKGROUND

Each of these five policy questions has been considered in past studies of volunteerism. These studies have presented information and insights into how these five issues have affected volunteer organizations, the actions they have taken, and potential future volunteer policy options. We review past findings on these critical questions here in order to provide a context for the current research, conducted for this study. These same five issues are later reviewed regarding our research findings.

### *1. What is the impact of the national economy on senior volunteerism on the local level?*

The downturn and continuing uncertain economic situation in the U.S. is having an impact on human service agencies. Volunteer programs report being asked to manage with fewer resources despite greater needs. They have less financial support, increased client loads, a heightened demand for services and increased costs such as insurance and salaries.

In addition to providing services to ongoing client cases, agencies are confronted with new clients seeking assistance due to job layoffs and loss of benefits (Kouri, 1990). Unemployment has extended to white collar and middle management employees who are entering the ranks of the formerly employed. Ironically, many of these workers had been volunteers and donors in the past.

Demands on all agencies are expected to become even greater when the full impact of lay-offs is felt and if the economic downturn should continue (King, 1992). Often volunteer agencies are being asked to meet the newly emerging needs resulting from limited resources and to pick up the slack not met by government or other sources of aid.

### *2. What is the status of funding of local senior volunteer programs?*

When resources for aging activities are tight, competition can occur on the local level between applicants for the same funds. Old and new senior volunteer programs may find themselves opposing each other in the quest for limited dollars. Senior volunteer programs may receive funding, but not necessarily for the amount requested. Conflict may occur within agencies as aging programs vie with other programs for a share of an agency's budget.

Local agencies which cooperate during economically strong times may no longer afford such relationships. The corporate sector which has supported volunteer programs must reevaluate their return on investments; senior volunteer programs cannot assume that past donations will be renewed (King, 1992).

Policy guidelines for future funding of voluntary agencies have been suggested by the Independent Sector, a national coalition of 650 foundations, corporations and national voluntary organizations: (1) do not allow government to transfer government responsibilities to voluntary organizations; (2) maintain and strengthen tax incentives for charitable giving; (3) do not impose new taxes on nonprofit organizations but remove the existing two percent excise tax on foundations; (4) stimulate development of hundreds of more effective voluntary action centers (O'Connell and O'Connell, 1989). The Independent Sector, which comprises 6% of national income and spends \$250 billion a year, maintains that these guidelines could affect society's needs and volunteerism's goals.

### 3. *What is the relationship between local senior volunteerism and employment?*

Several policy issues affect senior volunteerism and work. Reimbursement for out-of-pocket expenses can be vital to maintaining senior volunteer participation; out-of-pocket expenses should not be eliminated completely. Reimbursement of senior volunteer expenses may incur less adverse affects than other budget categories when public and private sectors reduce funding for volunteer programs.

Involvement of senior volunteers in program management in the place of paid employees can help control program costs. Substitution of volunteers for paid staff may be prohibited by public law; contracts with employee unions and can give rise to outright employee opposition, demoralization and hostility. A strong ethic pervades the field of volunteerism which implies that volunteers, young or old, should not be involved to the detriment of regular staff.

A potential exists for exploitation of volunteers who are not paid for their labor (Cahn, 1988; Koeck, Shreve and Gagnier, 1981). Effective senior volunteer involvement can be impeded when paid professionals are unwilling to accept them as legitimate partners. When paid staff resent and fail to support senior volunteers, volunteer programs are likely to encounter problems with retention, morale, and performance (Brudney, 1990).

Future senior volunteer programs will need to consider employment related issues including barriers to volunteerism, volunteer career pathing, effective recruitment strategies, positive working conditions, and a system of incentives or fringe benefits (Costello, 1991). Volunteer recruitment can be enhanced by programs that prepare older volunteers for challenging positions and training them for meaningful work (Heil & Marks, 1991; Lynch, 1990; O'Donald, 1989).

### 4. *What role does risk management play in local senior volunteerism?*

Risk management has become a seri-

ous concern of senior volunteer programs. In the past, the public attributed an underdog role to volunteer agencies based on their perceptions of the purposes, administrative style, female gender orientation, and financing of volunteer agencies. This role has changed; heightened resource capabilities have positioned senior volunteer programs for possible attack (Wilson, 1992).

Actions of senior volunteer programs are being challenged legally. Volunteers and agencies can be sued; for some complainants, suing is preferred to negotiating out of court (Schindler, 1992). For a volunteer organization, protection against a lawsuit can be expensive due to the high costs of insurance and litigation (Wilson, 1992).

Awareness and resolution of certain personnel issues in volunteer management can reduce liability problems. These issues include: obtaining a reference check on a volunteer; maintaining confidentiality of personnel files; complying with wage and hour laws; addressing stipend and reimbursement concerns; implementing a progressive disciplinary approach; and avoiding defamation of persons when dismissal from a volunteer position is warranted (McCormick and Warbasse, 1992).

### 5. *How does an aging society affect senior volunteerism on the local level?*

The changing demographics of a growing elderly population will require increasing numbers and types of volunteers to address the needs of senior volunteer programs (Robert Wood Johnson, 1989). Older adults represent an untapped resource for community service and social action (Costello, 1991). The percentage of volunteers in the older population range from 9% to 37% (Fischer et al., 1991).

Volunteering at all ages has been influenced by several factors. Income and education are positively related to volunteering (Lemke and Moos, 1989). Married persons are more likely to volunteer than unmarried persons although this factor may be explained by the higher incomes

of married persons (Chambre, 1984; Hodgkinson & Weitzman, 1986). Women spend more hours volunteering than men but the greatest recent increase has been found among men (Hayghe, 1991; Romero, 1987; Morgan, 1986).

## METHODS

A national survey of local-level agencies on the topic of volunteerism and aging was conducted in 1992 by the Center on Aging at the University of Maryland at College Park. Respondents were associates of the Voluntary Action Centers (VAC). Voluntary Action Centers (VACs) act as referral services that encourage volunteerism throughout the United States. VACs are notified by organizations of their need for volunteers. The VACs refer this information to potential volunteers and assist them in linking up with appropriate volunteer positions. The 372 associate members of VACs operate independently although most receive basic funding or are part of United Way. VACs provide technical assistance such as training to nonprofit agencies and they help corporations develop volunteer programs. VACs are inter-related in the Points of Light Foundation through which they share ideas and resources.

All 372 associate members of VAC agreed to respond to a 116-item mailed questionnaire containing both open and closed ended questions on state policy on volunteerism and aging. Complete questionnaires were received from 160 respondents for a response rate of 43%.

## FINDINGS

Data addressing the five key questions are presented below. These data represent the viewpoints of the VAC directors which are based on their perspectives as local agencies faced with these challenges in an aging society.

### *1. What is the impact of the national economy on senior volunteerism at the local level?*

The state of the national economy has

been a pervasive concern in the United States in recent years. An unstable, unpredictable economy has had a far-reaching impact on multiple aspects of American society including senior volunteerism. According to VAC respondents, the national economy has had an impact on local senior volunteer programs over the last five years in four areas: funding, number of volunteers, number of clients served, and units of volunteer service. Funding has decreased for 38.75% of VACs. The number of senior volunteers increased 58.75%, a situation attributed by many respondents (35.67%) to increases in social needs. The number of clients served increased (71.25%) as did the number of units of volunteer service (up 50.62%).

### *2. What is the status of funding of senior volunteer programs?*

The state of the national economy is reflected in the state of funding of senior volunteer programs. Funding sources, the amount of funding, and resource allocation have changed for VACs over the last five years. The number of funding sources totaled 447 and the average number of funding sources for each VAC was 2.8. Top funding sources were foundations (55.62%), private sector (55.0%), private donations (50.62%) and government (50.62%) based on sum of state (26.87%) and federal (23.75%).

Change in the amount of funding was reported by a large percentage (80.62%) of VACs. Increases in the amount of funding are noted primarily for the private sector (28.75%), foundations (25.0%), and private donations (24.38%). Funding increased for 215 sources and the average number of funding sources per VAC was 1.34. Decreases in amount of funding were cited primarily for state government (15.62%), foundations (14.38%), and private sector (11.88%). Funding decreased for a total of 119 sources. The average number of decreases in funding sources per VAC was .74.

Resource allocation has also changed for VACs. Many VACs (77.5%) have noted changes in the amount of funds assigned to various budget categories. The primary increase has been in operational funds reported by 55.62% of responding VACs while relatively smaller percentage increases were noted for unrestricted funds (15.0%) and start-up funds (13.12%). Decreases in budget categories have been relatively minor with a decrease ranging 5–10% in each category. These changes suggest a direction that VAC budgets, and consequently VAC senior volunteer programs, may be taking in the future.

### *3. What is the relationship between local senior volunteerism and employment?*

Senior volunteers are, by definition, the core of senior volunteer programs. It can be difficult to manage a senior volunteer program when the definition of senior volunteerism is in a state of flux. Volunteerism was once characterized by one individual helping another individual through direct, personal contact. Senior volunteerism has developed into a highly organized and often a large scale activity. Recruitment and retention of senior volunteers and the relationship of senior volunteerism and employment are critical (Klug, 1990).

Social needs (35.62%) have contributed the most to an increase in the number of volunteers at VACs: The "opportunity to do something useful" (70%) is the primary feature that attracts VAC volunteers. Other factors in recruitment were cited by less than 4% of respondents. Recruitment of senior volunteers has become a difficult task due to competition with other programs for the same pool of volunteers (cited by 28.75%). Although competition for senior volunteers is a critical issue in maintaining and advancing senior volunteer programs, VAC respondents (76.88%) indicated that a program can have too many volunteers. Recruitment and retention can be affected by reimbursement of expenses but VAC responses give mixed

opinions, with responses about reimbursement distributed evenly along a continuum ranging from "very important" to "not important."

The relationship of senior volunteerism and employment is an unresolved issue. Volunteerism, unlike employment, is an activity that does not receive monetary compensation. This distinction has become less clear as voluntary organizations adapt employment practices to volunteerism. Only 8.75% of VACs noted state level opposition to the practice of providing stipends to certain senior volunteers for their activities. Over half the VACs (58.12%) stated opposition to senior volunteer programs which may be replacing paid workers with senior volunteers. Sources of opposition were unions (59.38%), program staff (51.5%), senior volunteers (32.5%), and private sector (30.62%). Nearly half (47.5%) of the VACs offered guidance to programs on how to reassign senior volunteers into other volunteer assignments. One third (35%) of the VACs offered guidance to programs on how to retire senior volunteers.

### *4. What role does risk management play in local senior volunteerism?*

In an era of increasing emphasis on legal matters, risk management issues are affecting administration of senior volunteer programs. Half (50.62%) the VAC respondents report having a policy on providing insurance coverage for programs. Liability insurance is the most popular (46.25%) and other types of insurance are cited by only a small percentage. The importance of providing personal insurance to senior volunteers receives a mixed response ranging from "very" or "somewhat important" (46.88%) to "unimportant" or "don't know" (31.87%).

### *5. How does an aging society affect senior volunteerism?*

Changes in the 65 and over population affect volunteerism at the local level within individual states and across the

United States. The majority of VACs (94.38%) report 13–18% of the population in their states are age 65 and over, compared to an overall rate of 12.6% in the 1990 population (AARP, 1991). VACs cited the economy as the most significant factor affecting volunteerism among older persons in their states. These VACs report that the economic situation has affected a 41.5% decrease in funding of senior volunteerism in their states, a 61.5% increase in number of senior volunteers, a 75.4% increase in the number of people served, and a 53% increase in units of service.

VACs (40.62%) reported 19–20% of older persons are categorized as poverty level in their states. This figure compares with a 12.2% poverty rate for persons 65 and older and a 19% rate for the poor or near poor in 1990 (AARP, 1991). VACs cited the economy as the most significant factor affecting volunteerism among older persons in their states. These VACs report that the economic situation has affected a 37.5% decrease in funding senior volunteerism in their states. The economy has affected a 58.1% increase in numbers of senior volunteers, a 71.3% increase in the number of people served, and a 50% increase in units of service.

Influences on senior volunteerism policy on the local level were reported by VACs. When asked to name all major influences, VACs cited senior volunteers (60.62%), funding sources (57.5%), state voluntary associations (56.25%), and state legislators (53.75%). When asked to name the primary influence, VACs cited voluntary associations (16.88%), state legislators (15.0%), and funding sources (11.25%).

## DISCUSSION

### *1. What is the impact of the national economy on senior volunteerism at the local level?*

Senior volunteer programs are doing more with less funding. On one hand, funding for local programs has decreased in terms of actual dollars (for 39% of VACs) or decreased in value due to inflation (for 44% of VACs). On the other

hand, utilization of senior volunteers has increased in terms of number of people served (71%) and number of units of senior volunteer service (51%). The number of senior volunteers to meet these needs is up 59%. These figures indicate more people are being served by more volunteers but with less units of service per client.

Although senior volunteer activity is currently strong in local programs, there is a question about how long volunteerism will be able to continue this pattern before reaching limits in performance and program expansion. Compounding this problem is the increasing number of elderly and their need for services provided by volunteers.

### *2. What is the status of funding of local senior volunteer programs?*

The state of funding reported by the VACs suggests factors for consideration by local senior volunteer programs in raising and managing funds. Unlike the past when senior volunteer programs typically were sponsored by a single dominant and reliable funding source, VAC funding comes from nearly three sources and averages five major types of sources per VAC. The sources are varied, coming from foundations, the private sector, and the public sector.

Management of multi-funded senior volunteer programs at the local level changes, particularly in the areas of grantsmanship, fund raising, and marketing. The process of applying for funding, once simple and informal, tends now to be more complicated and formal. Business which might have been conducted through a handshake or letter of understanding between local participants is being replaced with detailed written applications, critical review of proposals, and competition for limited funds. Competition has increased and success in obtaining funds, even through multiple applications, is uncertain. The quest for funding has expanded from local supporters to include state and national sources.

More staff time of local senior volunteer programs is being allocated to fund raising. A staff that is already overloaded with tasks is faced with difficult options:

- 1) Pursue funding, increase administrative work time, reduce direct service contact, and increase the risk of meeting fewer client needs involving direct contact;
- 2) Do not increase administrative work time and run the risk of not securing adequate funding and the program declining while maintaining direct service contact;
- 3) Enter other organizational relationships such as a merger which combine organizational resources and possibly increase client services;
- 4) Cut back or terminate all or selected operations.

Another approach to funding is to focus on developing staff capabilities and expanding their tasks. Staff in senior volunteer programs are often motivated by an altruistic orientation and they measure performance in terms of the people they served. Staff, however, are becoming increasingly called upon to perform organizational tasks, such as fund raising, grantsmanship and marketing. Redefinition of job descriptions and retraining are needed to enable staff to have the capabilities needed to compete for funds.

### *3. What is the relationship between local senior volunteerism and employment?*

The distinction between senior volunteerism and employment is narrowing. Among the interfaces that may occur are:

- 1) A senior volunteer acquires training, supervised experience, and an opportunity to become proficient at skills transferable to the local market place;
- 2) Local employers provide financial support to senior volunteer programs to conduct training and supervise experience as prerequisite to volunteers accepting paid jobs in the work place;
- 3) Senior volunteer programs need additional expertise that their limited, over committed budgets and already demanding work loads are unable to

cover. Employers provide consultation to senior volunteers in needed areas such as financial management. Consultation may be offered as a civic responsibility, for tax incentives, to improve corporate image and to forge political/economical/social ties;

- 4) Stipends may provide limited monetary compensation to senior volunteers who meet eligibility requirements and offer certain services to local clients. Stipends provide earned income for the financially disadvantaged and pump dollars into the local economy.

### *4. What role does risk management play in local senior volunteerism?*

This study suggests the importance of insurance to senior volunteer programs and identifies liability insurance as the main type of insurance purchased. The increased financial stature of senior volunteer programs, a social system in which litigation has become common, and the large scale operations of volunteer organizations have contributed to a demand for policies which protect the interests of senior volunteers and senior volunteer programs.

The high costs of insurance can prove prohibitive to senior volunteer programs, particularly in a time of budgetary restrictions. Using funds to purchase insurance can mean that expenditures for other items, including direct client services, may have to be reduced. The mission of a senior volunteer program may have to be rethought and activities eliminated to free up funds to purchase adequate insurance coverage. When the risk management issues become insurmountable, the senior volunteer program may have to be dissolved. The outcome on the local level is clients who need services cannot obtain them.

Resolution of this problem is tied to the implementation of policy that redefines the parameters of litigation and insurance claims. Senior volunteer pro-

grams can work in their local communities with their professional association and other allies such as government, corporate sponsors and client associations to enact risk management policies acceptable to volunteerism.

5. *How does an aging society affect senior volunteerism on the local level?*

Changes in the population 65 years and over influence the configurations of volunteerism on local, state, and national levels. Ideally, response to increases and decreases in the numbers and needs of the older population for volunteer services should be rapid. Realistically, response rate may be slower. Time is needed to accomplish shifts in funding, staff, facilities, and volunteers between programs. Political considerations affect how funds are allocated, independent of need. Although planning could help alleviate the time gap between identification of a need and implementation of a solution, planning by senior volunteer programs is limited by several factors: lack of financial support for staff to devote time to planning function, day-to-day pressures that make service activities the top priority, and uncertain prospects of being able to implement long range plans.

## CONCLUSION

VAC associate members report issues that their programs are confronting regarding senior volunteerism. Policies will need to be developed regarding these issues so that VACs can manage senior volunteerism effectively in a constantly changing environment. In order to accomplish this, the needs of local level agencies must be reviewed in the context of the state and national environments impacting them. Policy developed at these levels must take into consideration local-level problems and issues and all three levels must work together for effective outcomes.

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## ABSTRACT

*The role of the direct service volunteer on the voluntary board is explored and its organizational structure is examined to determine if it facilitates the flow of information from volunteers. The study questions whether volunteers can effectively communicate their suggestions and concerns about volunteer and organizational needs given the structure imposed by Board Member Manual procedure. A two-way relationship via the Volunteer Advisory Committee is suggested where political participation through the committee can give volunteers a political structure to express opinions pertinent to volunteer causes and clear lines of communication between staff, volunteers, and the leadership can be established.*

# The Direct Service Volunteer and Voluntary Board Member: What Are the Roles and Responsibilities?

Autumn Danoff, MS

## INTRODUCTION

Voluntary organizations such as the American Red Cross and the Easter Seal Society are central to American society. The United States is increasingly dependent upon these organizations to provide the physical and psychological support services that can no longer be supplied by government alone (Keyton, Wilson & Geiger, 1990). With every second American adult serving as a volunteer in the nonprofit sector and spending at least three hours a week in nonprofit work, the nonprofits are America's largest "employer" (Drucker, 1990).

Volunteers differ from paid workers in nonprofit organizations only in that they are not paid (Drucker, 1990, p. 181). Their role has shifted over time from helper to unpaid staff and they have become increasingly important to the nonprofit. With more than eight million employees and more than 80 million volunteers, today's nonprofit organizations must be information-based and structured around

information that flows up from the individuals doing the work, to the people at the top, the ones who are, in the end, accountable (Drucker, 1990).

## VOLUNTEERS ON THE BOARD

To learn how volunteers feel about procedures and policies of the organization and to increase the board's knowledge about the direct services of the organization, some nonprofits have established volunteer representation on the voluntary board of directors. Their intention is to promote volunteer participation and to provide volunteers with an organizational structure to express opinions relevant to volunteer and organizational needs. This study examines the role of the volunteer representative on the board to determine if the hierarchical structure described is an appropriate forum for information gathering from volunteers. It also questions whether volunteers can effectively communicate their concerns and suggestions about volunteer and organi-

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zational needs, given the structure imposed by board procedures.

## THE NONPROFIT BOARD

Nonprofit organizations are not businesses; therefore the nonprofit board plays a very different role from the company board. In the typical nonprofit organization the board is deeply committed. The voluntary board helps the organization think through its mission, is the guardian of that mission, makes sure the organization lives up to its basic commitment, and appraises the performance of the organization (Drucker, 1990). In sum, board membership means responsibility to the organization, to the board itself, to the staff, and to the institution's mission. The board of directors has final responsibility for the achievement of the organization's goals and objectives.

To accomplish these tasks, it hires an executive director to implement board policy and organizes itself to establish that policy, to fulfill its role, and provide support to staff (Conrad & Glenn, 1976). Board policies determine what the organization will do. The administrator implements policy and determines what individual employees (and volunteers) will do for the organization in carrying out board policy ("The Board Doctor," 1991).

### *The Voluntary Board Member*

Voluntary board member and volunteer representative are not synonymous. Conrad and Glenn (1976) describe four fundamental roles of the voluntary board:

1. **Policy determination:** It is the responsibility of board volunteers to set the policy of the voluntary organization by serving on the board and on the various board committees;
2. **Resource development:** It is more than just raising money. Board volunteers have the responsibility to fund policy decisions they make. A triad of resources for a voluntary organization include support (contribution dollars), participation (people who are involved and committed), and understanding

(enhancing the public image);

3. **Sanction:** Board volunteers give the right to exist as an organization;
4. **Retention:** The board hires the staff chief-executive (a crucial appointment).

### *The Volunteer Representative*

A volunteer representative, on the other hand, is a volunteer, or unpaid staff member, who is elected or appointed to the voluntary board of directors in order to represent volunteers in the organization.

A volunteer is a person who, out of free will and without wages, works for a nonprofit organization which is formally organized and has as its purpose service to someone or something other than its membership (Jenner, 1982).

To function as an effective board member the volunteer representative needs to be aware of not only his or her role on the board, but also the administrator's role. In order to ascertain if a volunteer concern is a board issue or an administrative issue, the volunteer must ask whether it affects the organization as a whole (administration and staff handle issues that affect individuals/volunteers).

The executive director fulfills management functions such as planning (short-term), organizing, staffing (such as the hiring and firing of staff members), directing and leading, and controlling (spending the current budget) ("The Board Doctor," 1991).

## THE STUDY

Given the roles outlined above, the author asks: (1) Which, if any, volunteer issues are appropriate material for volunteer representatives to bring for board discussion? (2) Might a conflict of interest exist between the volunteer's role of unpaid staff under the executive director and the hierarchical position of the board? and (3) Does the volunteer representative remain eligible for elected board position if/when the volunteer is terminated or resigns from his or her volunteer position in the organization?

## THE BOARD/STAFF CONNECTION

In addressing some of the concerns stated above, "The Board Doctor" (1991) cites two simple rules of thumb in addressing board/staff relations. The first is that all communication between the staff and board should be channeled through the executive director. Personnel management is the administrator's job. Unless there is policy to the contrary, staff grievances should not go to the board ("The Board Doctor," 1991). Volunteer (unpaid staff) grievances should not go to the board. When the board listens to volunteer/staff grievances, they may be settling one problem and creating new, more serious problems such as sending the staff mixed signals about who is in charge and creating a strain on the relationship between the board and the administrator. If the volunteer representative brings volunteer concerns/suggestions directly to the board, the volunteer representative breaks the first rule of thumb, that all communication between the staff and board is channeled through the administrator. If this is the case, how does the volunteer representative represent the volunteers and how can the volunteer representative increase the board's knowledge about the organization?

"The Board Doctor's" (1991) second rule of thumb is that boards do not manage staff, administrators do. The staff does not evaluate the administrator. A possible conflict of interest can occur when the volunteer, or unpaid staff member, sits in a position to evaluate the administrator. Not only is it difficult for staff to remain objective when evaluating their "boss," but it also would be so for the volunteer.

A third area of concern involves the administrator's role in firing staff or terminating volunteers. In these instances the administrator makes the final decisions while the board has no role. Contract issues may be implicated when an organization and a volunteer enter into a contract, agreeing upon conditions of the volunteer's service. There are potential

discrimination and civil rights issues in the hiring and firing of volunteers (Kahn, 1990). What, then, is the board's legal and ethical stance when a volunteer resigns or is terminated from his or her volunteer position and desires to remain on his or her elected position on the board?

Can a nonprofit organization, with the hierarchical structure described above, facilitate the flow of information from the volunteers who perform the service up to its organizational leaders through volunteer representation on the board?

## THE TWO-WAY RELATIONSHIP

An effective nonprofit organization builds a two-way relationship with its volunteers by asking, "What do you have to tell us?" The question brings problems out in the open. According to Drucker:

. . . Every organization wants and needs stars, but as in a good performance the star is not separate from the cast. The cast supports the star and as the star delivers an outstanding performance, the supporting cast is lifted out of its mediocrity. That is the payoff of an effective two-way relationship (Drucker, 1991, p. 159).

The political participation and political structure of voluntary organizations contribute to the sense that people have of an organization being truly theirs. Outstanding volunteer organizations are rated by their leaders as having members who are lower in apathy. In addition, outstanding organizations' leaders see their rank-and-file members playing a more significant role in decisions. They are also more likely to have committees, as a political organizational feature, other than the board of directors or an executive committee (Smith, 1986).

Seventeen Miami-based nonprofit service organizations were randomly surveyed (see Appendix) to determine if: (1) the organization had a board of directors; (2) the organization involved volunteers to delivery direct services; (3) the organization included volunteer representation

on its voluntary board. A "service organization" is defined as an organization that has as its purpose to help others or to do things for others (Heidrich, 1988). The survey indicated that 16 of the surveyed organizations operated with a board of directors and one with an executive committee. Three organizations did not include volunteers on their boards and 12 did not distinguish between *volunteer* and *volunteer representative* on the voluntary board.

The rationales for including volunteers on boards were: (1) volunteers identify community needs and problems; (2) volunteers initiate policy and programs to meet community needs; (3) volunteers contribute their knowledge, skill, interest, leadership, and money to the organization; (4) volunteers solicit support and participation in organizational functions; (5) volunteers use their influence in the community to get things done; and (6) volunteers increase the board's knowledge about the organization's effectiveness (feedback). Twelve organizations made additional forums (formal and informal) such as committees, meetings, and questionnaires available to their volunteers.

Volunteer administrators who trust their volunteers arrange meetings in which volunteers can offer opinions about organizational structure and procedures and allow volunteers to make important decisions. They understand that many volunteers seek a chance to be involved in action that alleviates a problem. They also maximize learning and developmental activities and facilitate an organizational climate that allows volunteers to be self-supporting (Ilsley, 1990).

The two-way relationship is reciprocal and the organization has an obligation to meet the needs of its volunteers. If the organization does not respond to the needs of its volunteers, morale will fall and volunteer turnover will rise. The increasing size and complexity of nonprofit organizations require a more sophisticated volunteer administration to recruit, train,

and retain volunteers. Without volunteers to provide leadership, carry out tasks, and deliver services, many organizations and the services they provide would cease to exist (Cull and Hardy, 1974). This is especially critical in organizations for which recruitment is difficult due to the nature of the work and/or the amount of time invested in training due to the specialized service. Disaster relief and crisis intervention are two areas in which people are least likely to have volunteered and the area in which people are least interested in becoming volunteers (J.C. Penney Survey, 1987). It is especially important to retain volunteers in these areas.

If an organization includes volunteers on the voluntary board, yet, due to its organizational structure, inadvertently creates a barrier that prevents the information flow from those doing the work to its organizational leaders, the organization in question can meet its obligation to the volunteers by identifying the barrier and creating a path for a two-way relationship.

#### THE VOLUNTEER ADVISORY COMMITTEE

The advisory committee is presented as a path for a two-way relationship so that participation through the committee can give volunteers the organizational structure to express concerns and suggestions about volunteer and organizational needs. The committee's recruitment is influenced by information about the role and responsibility of the group and the staff's relationship with the volunteers (Macduff, 1989). Expected outcomes of an advisory committee include:

1. Leadership officers and volunteer coordinators who take on responsibilities relevant or important to volunteer causes;
2. Members who demonstrate personal commitment to volunteer goals and who can articulate those goals;
3. A communication system by which problems can be comfortably raised and solved and through which issues and the decisions surrounding them are carefully documented;

4. External contacts or support with the board and other levels of administration are maintained through well-defined channels.

Recruitment for the advisory committee begins by insuring that volunteers know what will be expected of them. Roles and responsibilities are spelled out and volunteers are informed what staff members are available to support them. Staff support includes record keeping, continuity, timely reporting and recognition of the work done by the committee. It also includes the development and maintenance of the general structure of the group. Staff members should also provide assistance and leadership in the development of operational policies and procedures. Volunteers need to be educated about the organizational structure and leadership. Retention is influenced by the two-way relationship that exists with the staff. This includes a commitment to teamwork, clear lines of responsibility, and good communication among staff, volunteers, and the leadership in the organization (Macduff, 1989).

According to Macduff (1989), volunteers on the advisory committee should understand the meaning of the word "advisory" and that their role is different from a board of directors. Most advisory groups focus their attention on known problems or existing concerns. It is easy to move from assigned tasks to other problems in the organization, so it is essential that members understand the limits of their area of exploration. The findings of the committee should be compiled into written statements followed by information which points to new opportunities or major problems that need attention.

## SUMMARY

If the staff is objective and open to suggestions from the volunteers, involves volunteer time and talents wisely, exhibits openness in their individual and organizational relationships, adequately

prepares for all meetings with the volunteers, shares leadership with volunteers, and advises the volunteers as to the appropriate role/responsibility they have to the organization (Macduff, 1989), the advisory committee can be an effective forum for volunteers. The information will flow up from the individuals doing the work to the people at the top—the ones who are, in the end, accountable (Drucker, 1990)—and the volunteers will move from political observer (passive role) to political participant (active role) in the nonprofit organization.

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## ABSTRACT

*Writing and updating policies for volunteer programs is a key strategy to gain the attention and recognition of board and senior administrators for volunteer programs and for managers of volunteers. Further, in light of the recent and rapid growth in volunteering and in the complexity of volunteer work itself, policy development has become an indispensable element in risk management and liability reduction. Managers of volunteers are encouraged to involve their boards and CEOs in policy development. Building the framework of beliefs, values, and rules through policies will ensure both safe and satisfying involvement for the volunteer, and effective service for the client.*

# The Key to the Boardroom Door: Policies for Volunteer Programs

Linda L. Graff

The word "policy" is one with which we are all familiar, yet for most of us, it is difficult to identify exactly what it means in the context of our agencies and programs. The very word "policy" can be intimidating. Few people work with policies on a regular basis. Most do not have the opportunity to understand policy or to feel at ease with it.

Managers of volunteers may be particularly unfamiliar or uneasy with policy, what it means, what it does. Some may think that policy is beyond their mandate, that policy is typically the responsibility of boards and senior management.

In fact, while boards and senior management do need to attend to matters of policy, so do managers of volunteers. The latter are the most vital link in successful policy development for volunteer programs. Managers of volunteers need to take the initiative, define the need, provide the drive, and contribute the expertise about volunteering and volunteer program management.

Those who do pursue policies for their volunteer programs can expect rich re-

sults such as increased program effectiveness, a more concrete demonstration of volunteer appreciation, and safer and more productive volunteer involvement. Further, by involving themselves in the policy development process, managers of volunteers may gain access to another whole realm of power and influence for themselves as professionals, and for their programs.

For so long, volunteer programs have gone under-recognized and under-valued. They are often ignored and suffer from what Susan Ellis (1986) has called 'benign neglect' from boards and senior management. Managers of volunteer programs are often at the bottom of the organizational hierarchy, under-paid, over-worked, and taken for granted. Boards and senior management have lost touch with how important volunteers have become to service delivery and to the community life we all have come to enjoy.

If managers of volunteers can bring forward programmatic policy issues and questions that belong on the board table and demand the attention of their senior

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managers, then, for the first time, boards and senior management will be forced to really look at the important work being accomplished by volunteers. Policy development for volunteer programs is the key to the board room door and perhaps to the beginnings of the recognition and support and power that volunteerism deserves.

## DEFINITIONS OF POLICY AND PROCEDURE

There is a variety of perspectives on what policy is or should be. A number of definitions of policy are presented below since each offers different elements of what policies are about, what they can achieve. All are accurate and none is complete.

*Webster's New World Dictionary* (Second College Edition) defines policy as "a principle, plan, or course of action." Two distinct themes emerge from this definition:

- Policy, in the sense of a principle, implies that some kind of position is being taken, a value or belief is being stated.
- Policy, in the sense of a plan or a course of action, would include specific steps, procedures, or perhaps, methods.

Organizations need to articulate their values through missions and policy statements; organizations also need to have procedural guidelines in place to instruct staff (paid and unpaid) on what to do or not to do.

Shaw (1990) adds these thoughts on the nature of policies:

- Policies apply to everybody associated with the organization—its directors, staff, volunteers and clients;
- A policy states a boundary: inside the boundary, things are acceptable; outside the boundary, things are not;
- It is also in the nature of a policy that violations make one liable for consequences; in that sense, a policy is tough.

Cryderman (1987) helps clarify the difference between policies and procedures. She says policies tell people *what* to do:

Policies form the written basis of operation secondary to legislation and the organization's bylaws. They serve as guidelines for decision making; they prescribe limits and pinpoint responsibilities within an organization. Policies can be viewed as rules or laws related to the facility's overall mission, goals and objectives. They are usually broad statements that are general in content. Despite this, policies may be detailed and particular if appropriate to the subject matter.

On the other hand, procedures tell people *how* to do what they must do:

Procedures give directions according to which daily operations are conducted within the framework of policies. They are a natural outgrowth of policies, supplying the "how to" for the rule. Procedures describe a series of steps, outline sequences of activities or detail progression. Thus the procedure manual is operational and is usually best expressed in a directive tone (Cryderman, 1987).

It is sometimes difficult to distinguish between policies and procedures. Perhaps it is wise to follow the pragmatic advice of John Carver (1990): it really is *all* policy—it just appears at different levels of specificity—so what you call it doesn't matter all that much.

What is most important is that policies and procedures are designed and implemented, regardless of what they are called.

## BENEFITS OF POLICIES

Many organizations simply have not had the time to attend to defining the values and policies within which volunteering takes place. Given the current situation wherein everyone is trying to do more and more with less and less, this is understandable. Yet, policies must be attended to. Here are some important reasons why:

- All organizations make policy decisions regularly. They do not always call them policies, and they often do not write them down. So, writing poli-

cies can be a simple matter of formalizing decisions which have already been made.

- Writing decisions in the form of policies and distributing them to paid and volunteer staff can lend them greater import and perhaps better ensure compliance.
- Many policies are developed because of crises or problems. When something goes wrong, it becomes apparent that a position or policy is needed, either to decide what to do now, or to prevent the situation from recurring. So policies determine action and set boundaries beyond which one cannot go.
- Policies clarify responsibilities and define lines of communication and accountability.
- Policies provide a structure for sound management. Since they often identify the "what" and sometimes even the "how," they can bring about program improvements and increase effectiveness.
- Policies ensure continuity over time and from staff to staff. In this sense, policies endure. They promote equity and standardization.
- Policies establish values, beliefs and directions. They connect programs and the work of front-line (paid and unpaid) staff to the larger organization and its mission.

These reasons for investing resources in policy development are equally valid for all departments and at all levels throughout organizations. For volunteer programs, there are some special circumstances that make the development of policies more urgent at this point in time.

The voluntary sector has grown and changed over the last few decades into an indispensable component of our service networks. The work of volunteers has become increasingly complex and responsible. Volunteers work directly with clients, carrying out the "real" work of agencies, often side by side with paid staff. What we have to acknowledge is that the greater the responsibility and complexity of the work, the greater the risk and liability to all those connected with the work.

As a key element in risk identification and management, policies around volunteer involvement can no longer be ignored. Consider these real-life examples:

- volunteers are transferring wheelchair patients in and out of vehicles without training;
- volunteer counselors staff a crisis line with little training, including how to deal with potential suicides, and they have no professional backup;
- a volunteer friendly visitor carries his "client" up and down a flight of stairs each week to take her shopping;
- a pharmacist volunteers as a friendly visitor for a mental health organization and is giving advice to clients about which of their prescription medications they should and should not bother to take;
- an elderly woman who has been a volunteer porter at the hospital for over two decades is beginning to lose her faculties. Last week she took a patient in a wheelchair to the wrong clinic where the patient waited for three hours before staff were able to locate him;
- female volunteers are sent out to do home visits with male ex-offenders, some of whom have been convicted of violent crimes. The volunteers go alone, with no briefing on the nature of the offense;
- high school students volunteer at a home for the aged, helping to feed residents, but they are not told what to do if the resident begins to choke.

Putting policies and procedures into place to guide the work of volunteers and to establish appropriate and safe standards of conduct is increasingly important as the work itself becomes increasingly responsible. This, perhaps more than any other, is the reason why organizations absolutely must begin to develop policies for volunteer programs. This is not to say that policies will resolve all problems and eliminate all hazards. However, policy development and implementation will go a long way to reduce the dangers and risks which currently exist in the field of volunteering.

## ULTIMATE RESPONSIBILITY— THE BOARD OF DIRECTORS

While there are many reasons to attend to policy development, for boards of directors and senior staff, the most pressing reasons may be based in risk management and personal and organizational liability.

There is great debate among authors in the nonprofit management field about the division of responsibilities between paid staff and boards, but there is consensus that ultimate responsibility and accountability lies with the board of directors (O'Connell, 1985; Ross, 1983; Ellis, 1986; Silver, 1988; Shaw, 1990). The increasing prevalence of legal action has implications for the degree of care exercised by boards in nonprofit management. There is not only a greater risk of legal action against organizations, but also against volunteer board members as individuals (Conrad & Glenn, 1976).

Ross lists a number of examples in the nonprofit field where responsibility has been placed by the courts with the board:

I think of a few recent cases that involve the Board in lawsuits: (a) in a hospital where a paraplegic fell out of bed and broke an arm, (b) in a hospital where a baby may have been murdered, (c) in a university where a black worker was not promoted while a white co-worker was, (d) in a university where a foreign student is suing because his doctoral thesis was rejected, (e) in a Big Brothers organization where parents are suing because their son was sexually abused by a 'Big Brother.' In all these cases it is the Board, the responsible unit, that is being sued and not the individuals most closely associated with the incident (Ross, 1983).

Perhaps one of the greatest errors board volunteers make is simply not ensuring that they know what is going on throughout the organization they serve.

There have been several legal cases where board members were held legally accountable, largely because they had failed to exercise reasonable oversight

and objectivity . . . the trustees had not taken responsibility for knowing what was going on (O'Connell, 1985).

## BOARDS AND THE VOLUNTEER PROGRAM

In the same way that the board is ultimately legally responsible for the organization as a whole, it is also responsible for the volunteer component (Silver, 1988). Ellis notes that decision makers make a point of knowing about salaried workers, but the same does not hold for unsalaried personnel. Silver, in her research on what makes volunteer programs successful, echoes the same point:

Boards of Directors have the positional authority to empower volunteer programs in their agencies or, conversely, to model an attitude which can be described as 'benign indifference.' By their actions, boards establish an attitude toward volunteerism in their organizations. Even by doing 'nothing,' they are saying something. In this situation, neutrality is akin to indifference and promotes the message that volunteerism is unimportant in the organization (1988).

Believing that "not knowing" is an adequate defense is a common error that boards can make, and the volunteer activity of organizations is often an area about which boards could be more informed. In fact, many boards have virtually ignored the volunteer component of their agencies. If for no other reason than out of concern for personal and organizational liability, boards need to begin to inform themselves of the risks and policy issues operating around volunteer involvement.

Boards are often unaware of the kinds of risks that are being taken in the name of the organizations they are supposed to be managing. They are not fulfilling their duty to inform themselves or to look out for the interests of the individuals involved. And, of most relevance here, boards have not taken the steps to determine appropriate policies and ensure the development of procedural guidelines that would reduce risks and ensure more

effective voluntary participation. Such negligence could be interpreted in the courts as mismanagement, nonmanagement, and/or breach of good faith constituting a violation of the fiduciary duty of board membership (United Way, 1990).

Volunteer programs have developed to the level of legitimate, indispensable, "productive" departments. As such they both deserve and require full managerial attention. Not tending to the very real risks and hazards inherent in volunteer program operation is courting disaster. It places the agency and all of its paid and unpaid staff and clients at risk.

In the courts, in the press, in the public mind, boards can be, and are being, held accountable for mistakes, accidents or negligence on the part of volunteers acting as agents of the organization. "Not knowing" simply is not a good enough excuse, legally or morally.

#### EXECUTIVE DIRECTORS—THE IMPORTANCE OF STAFF LEADERSHIP

Senior management—typically Executive Directors, Chief Executive Officers, Administrators—share, with their boards, a significant degree of responsibility for agency and program operation. It is the responsibility of senior staff to bring issues to the attention of the board as well as to oversee all aspects of the day-to-day operation of the organization. But senior staff, like senior volunteers, can sometimes take volunteer involvement for granted.

After years of training and consulting with so many leaders of volunteers, I have become convinced that many of their concerns stem directly from a lack of substantive support from their agencies' top administrators. This lack of support is not due to malice or unwillingness to be of help, but is rather due to the failure of executives to understand what is really needed from them (Ellis, 1986).

To be fair, as Ellis (1986) reminds us, executives are often not taught anything

about volunteers in their formal schooling. And sometimes managers of volunteers do not pass along information about the volunteer program. Often opportunities are missed to bring volunteer activities to the attention of boards and senior staff—opportunities to remind, to educate, to advocate. Managers of volunteers are in the pivotal position to stimulate change in this regard.

As senior staff begin to recognize and appreciate the management principles required to operate the volunteer program, they may begin to utilize those same principles in working with their board and administrative volunteers. Many of those principles are completely transferable, and make for much more effective and productive boards and committees wherever they are implemented.

If CEOs recognize the great skills and expertise demonstrated by managers of volunteers, they might also see how much help the latter could be in recruitment, training, orientation, and retention of board and committee volunteers.

#### THE TEAM APPROACH TO POLICY DEVELOPMENT

Boards and senior paid staff must be involved in policy development. It is equally important that the manager of volunteers also be involved in the policy-making process, at least as it relates to the department/program. Indeed, the manager may be largely responsible for ensuring that the need for policy is brought to the attention of senior management and the board.

But in the same way that boards do not have the day-to-day knowledge of experience to design detailed policies, managers of volunteers rarely have the mandate to develop or approve organizational policies. They may risk overstepping their authority when they independently step into policy development.

Senior management and the manager of volunteers need to work together in the development of policies for the volunteer

program. Neither can do this alone. But since none of this is likely to happen spontaneously, the manager of volunteers must accept the duty to inform supervisors of the existence of potential risks and of the need for policy development. That is where it all must start.

## RESISTANCE TO POLICY DEVELOPMENT: 'YOU CAN'T DO THAT TO VOLUNTEERS!'

Undoubtedly, there will be readers of this article who are experiencing a growing sense of discomfort with, or even resistance to policy development in volunteer programs. Experience shows that resistance of this sort often surfaces around discussions of topics such as volunteer evaluation, performance review, disciplinary procedures, and so on.

Some managers and boards of directors continue to believe that because volunteers work for free and because they give generously of their time and talents, we have no right to criticize their efforts. Other times resistance is centered in the fear that volunteers will leave if we talk with them about their mistakes or about areas of their work performance that need change or improvement. Others may view the process of policy-making as one of overly formalizing volunteering—it can feel like we are “kicking the heart out of volunteering.”

Three comments in response to such anticipated resistance are in order here:

### 1. *Volunteering As Serious Business*

First, the business of volunteering has become serious business. We have developed and acquired the skills to mobilize great numbers of volunteers to do all kinds of important work, often involving direct contact with clients. There *may* have been a time in the past when the work of some volunteers was not sufficiently demanding or important to require careful tending. If that time ever existed, it has long since passed.

Now, in nearly all cases, if volunteers

perform their work poorly or act inappropriately, the consequences will have an impact on clients, and/or other staff, and/or the organization itself. The fact that the work of volunteers is not remunerated in monetary terms does not make it immune from error, risk, or consequence. Simply put, the work of volunteers must be managed. Volunteers deserve that from us. We are doing no favors by allowing volunteers to perform badly or to place themselves or others in jeopardy. Ignoring or glossing over less than satisfactory work becomes contagious: volunteers begin to treat their own work as we treat it, as if it does not matter. As Lynch (1983) has suggested, holding volunteers responsible for achieving results gives them clear results to strive for. It challenges volunteers to do well and demonstrates how important their work really is.

### 2. *Means and Ends in Voluntary Action*

Second, a note about means and ends. Many volunteer programs have been under-recognized and under-resourced for a long time. Those who have been in charge of volunteer programs, the Coordinators, Directors, and Managers, have had to be advocates for their programs and for their (unpaid) workers both within their own agencies and, often, to the larger community. Volunteer program managers have concentrated so heavily on enhancing the effectiveness of volunteers and programs that they have come to see them as an end in themselves. Operating a productive and effective volunteer program in which volunteers are happy, satisfied, and stay a long time has become the end goal.

What may be lost sight of, or at least, sometimes forgotten, is that volunteers are a means, a tool and a resource, to achieving something else. The real end, of course, is the service to clients, the mission of the agency. Volunteers, like paid workers, must serve that end. It is important to keep (or bring back) into focus, the needs of the clients and the agency.

When managers refocus on clients and service to them, it becomes more clear that it is necessary to do whatever it takes to make that service as effective as it can be. Hence, these positions require management of the volunteer work force. And in so doing, managers must continually engage in a kind of cost-benefit analysis in which the costs of volunteer involvement are weighted against the productivity (service) of that involvement. This may sound cold and calculating, but it is more accurately reflective of the role, and the importance, of volunteers and volunteering in the 90s.

### 3. Find Your Own "Fit"

The third comment is intended neither to contradict nor to diminish the importance of the two preceding points, but it is equally important: write policies that 'fit' each particular application. Be as formal, as stringent, as demanding as is appropriate to the values and beliefs of the organization. Temper policies so that they are congruent with "how you do business in your agency." Introduce new policies in a considered, considerate, and measured way. Too much change will surely drive some volunteers away.

### SUMMARY

But please do not dismiss, out of hand, the whole notion of policy-making because it does not seem relevant or appropriate to the nature of volunteering. Treat the volunteers and the volunteer program with the respect they deserve by building the framework of beliefs, values, and rules through policies that will ensure both safe and satisfying involvement for the volunteer, and effective service for the client.

Do not miss the opportunity to bring the volunteer program to the attention of the board and senior management. Do not miss the opportunity to demonstrate the importance volunteering has to the mission of the agency and the clients served. Policies are the key to open the doors of power to volunteering.

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### NOTE

This article is partly based on *By Defi-*

*nition: Policies for Volunteer Programs* (Graff, 1992), which is an excellent source for more details on how to write policies and for sample policies on over 70 policy topics. It is published by Volunteer Ontario, the Ontario Association of Volunteer Bureaux/Centres.

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