

a
roadmap
to managing
volunteer
systems
from grassroots to national

By Claudia Kuric and Sharon Koll
with contributions by Myrl Weinberg, CAE



NATIONAL HEALTH COUNCIL



**The United Nations General Assembly designated 2001
as the International Year of Volunteers to promote, recognize
and celebrate the vital services that volunteers provide.**

**The National Health Council is proud to serve
as a member of the U.S. Steering Committee,
helping to advance volunteerism in this country.**

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This book is dedicated to all staff who manage volunteers within voluntary health agencies. Your long hours and dedication contribute to the success of a strong voluntary health sector, which helps individuals with chronic conditions live longer, healthier lives.

A Roadmap to Managing Volunteer Systems: From Grassroots to National

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A ROADMAP TO MANAGING VOLUNTEER SYSTEMS: GRASSROOTS THROUGH NATIONAL

Introduction

A Roadmap to Managing Volunteer Systems: Grassroots through National is geared toward staff who manage volunteer systems. Our intent is to provide you with information, tools and checklists that combine to provide you with a field guide to help you anticipate, identify and address real-life situations that arise at your voluntary health agency.

If you work for a voluntary health agency or other nonprofit organization and you are responsible for managing volunteers, this book can help you. If you are responsible for overseeing competency development and performance improvement, this book has tools you need. Read through, and you will find tips and tools to help you:

- Prepare staff to manage volunteers;
- Determine the core competencies necessary for managers of volunteers;
- Utilize the idea of competency definition to aid in defining volunteer needs;
- Implement change within volunteer management systems;
- Create accountability and evaluation measures for volunteer management systems; and
- Use technology to improve a volunteer program.

This book differs from most information written about volunteerism. Its focus is not on finding and training volunteers; rather, it concentrates on preparing staff to successfully manage volunteers. The information in *Grassroots through National* comes from people who have put these tools to the test. We researched the best information and existing tools for volunteer management systems and combined that with the field experience and wisdom of people who have experience in voluntary health and other nonprofit volunteer programs.

How to Use This Book

We created this book so that the information would be easy to find and quick to apply in your work. First, we recognized and broke down the various levels of staff who manage volunteers to make sure that we provide information pertinent to all three levels. We define them as follows:

- **Community:** Staff who manage local, project-focused, short-term volunteers.
- **State/Regional:** Staff who manage combinations of projects in large geographical settings.
- **National:** Staff who are responsible at a national level for development and management of volunteer programs.

A detailed description of these levels begins on page 57. Each chapter begins with an overview to guide the reader toward information that is most useful to each staff level.

In addition, the following features throughout the chapters provide a quick guide to important information.

■ Jump Start

Actions you can take now to make improvements in this area.

▲ Foundation

Explanation of the topic and current thinking in the field in this area.

● Case In Point

Anecdotes and real-life field stories about the success of the topic or technique.

◆ WIIFY

(What's In It For You?) Compelling business reasons for implementing these processes and ideas.



Toolbox

Group exercises, training tools, assessments and checklists to help implement change.

The Words We Use: Volunteer vs. Unpaid Staff

The debate over whether volunteers are staff continues in organizations throughout the United States. An individual organization's culture determines the words used there. Some organizations strive to integrate all of their people resources into one human resources system. In these organizations, all people who accomplish work in the organization may be defined as staff, staff who are integral to building their organization and accomplishing its mission. In these organizations, the terms "paid staff" and "unpaid staff," or "paid staff" and "volunteer staff," are commonly used to delineate the two work populations.

In other organizations, the culture defines volunteers' work as complementary to, but different from, staff work. Volunteers feel proud of the distinct status they receive, and might be offended by the labels "volunteer staff" or "unpaid staff." Still other organizations may feel volunteers should not be called staff because the work their staff does is beyond the scope of volunteers.

In *Grassroots through National*, our goal is to promote an integrated human resource system and positive, productive partnerships between volunteers and paid staff. While words are important in defining roles, we believe it is more important to look beyond the words and examine whether the organizational culture truly does treat both paid staff and volunteers as partners in one integrated system. In *Grassroots through National*, we use the terms volunteer, volunteer staff, and unpaid staff interchangeably.

In addition, we do not define what a volunteer is — that definition is left to the reader. If there is any doubt, before you move forward with any of the exercises in this book, you may want to work with staff in your agency to determine two things:

- Within your own culture, who is a volunteer?
- Which staff are responsible for managing the volunteer workforce?



WHY THIS BOOK? THE BUSINESS CASE FOR MORE EFFECTIVE VOLUNTEER MANAGEMENT SYSTEMS

The seed for this book started shortly after the publication of a recent national study of voluntary health agencies. *Will the Best of Intentions Be Enough?* created a composite image of a sector in conflict with itself — having the best of intentions to address volunteerism issues head-on, yet lagging behind in addressing those issues. In the study, the voluntary health agency leadership appeared committed to keeping volunteers involved and satisfied, but they were not treating effective volunteer management as a top priority. For many voluntary health agencies, the engagement of volunteers was viewed as an intuitive process that flows naturally, not commanding a focus as a management discipline. The study was a wake-up call to a sector whose very existence relies on volunteer resources.

Grassroots through National answers that wake-up call with ways to prepare staff to effectively manage volunteers. It also provides strategies and tools that can improve volunteer management systems.

Why Make Changes in Your System?

Change requires precious time, energy, and resources. So why should any organization invest in improving volunteer management systems? Because volunteer systems are integral to the success of voluntary health agencies and other nonprofit organizations. A system implies interdependent parts. Like the interactive arms of a mobile, a change in volunteer systems affects other parts of the organization, including the mission, long-term strategy, program outcomes and funding. In the end, a positive change in your volunteer system will mean an improvement in your bottom line.

Other tangible outcomes include:

- Increased volunteer retention.
- Increased ability to cultivate long-term relationships over the life cycle of volunteers. The longer volunteers stay, the more they will develop brand loyalty and commitment to addressing the organization's unique mission.

- Increased reach because program delivery is volunteer-based. This can result in increased community representation, community involvement, visibility, local presence and access/collaboration with the community. It means you will be helping more of the people your mission is to serve.
- Standard, efficient business processes that include volunteer management data systems for tracking and managing volunteers, the outcomes of their work and volunteer satisfaction.
- Sector clout within the nonprofit arena, i.e., the ability to compete for resources (people and money) in the community.
- Increased advocacy clout.
- Performance measures to effectively track the involvement of volunteers in program delivery and fund-raising.

You'll Need To Change No Matter How Effective You Are

Even if you are doing well now in managing volunteers, changes are looming on the horizon. These changes will impact volunteer systems and the staff who manage volunteers. Two big areas that will alter volunteerism are changing societal dynamics and evolutions in voluntary health agencies and nonprofit organizations.

Changing Societal Dynamics Affecting the Volunteer Workforce

The field of nonprofit volunteerism is shifting. As our society careens through the beginning of a new century, the changes facing American society will also affect volunteerism. The trends and influences listed below will force staff to manage volunteer systems in new ways.

Types of volunteers. Within voluntary health agencies, volunteers will be needed who offer specific competencies, but who don't know your agency's health issue. There will be a melding of two diverse groups: traditional volunteers who represent the client constituency, and newer, distinctly skilled volunteers who have no emotional ties to the specific health issue.

Time. People have less free time, and the time they do have available for volunteering may not fit the traditional 9-to-5 schedule of organizations. Short-term and episodic volunteering will increase, and times when people are able to volunteer will span a wider range.

Changes in the population. Demographics in the United States are shifting dramatically. These include large, new immigrant populations; a growing elderly population; the workforce melding of several, distinctly different generations; and changes in the size and influence of several ethnic and racial groups. All of these shifts will demand an increased sensitivity to diversity in values, communication, and volunteers' needs and motivations.

How people work. Even now, the predictions of a new millennium workforce are reflected in the increase in home offices; "virtual," project-based, fluid teams; long-distance telecommuting; alternative work schedules; and free agents (vs. paid staff). These trends will affect how to find, manage and reward volunteers.

Technology. Changes in technology are already affecting volunteering — from computerized volunteer management information systems to volunteer recruitment via the Internet; from online volunteer jobs to long-distance learning. The ever-evolving technology will affect the way we think, work, communicate and conduct relationships — thus, impacting how we manage volunteers.

Changes Affecting Voluntary Health Agencies

The above changes will affect the field of volunteerism in general. What about changes specific to voluntary health agencies? *The Future of the Voluntary Health Sector*, a series of papers commissioned by the National Health Council, identifies several impending transitions for the sector:

- The effects of both an expanding aging society and increased ethnic diversity on health care needs within the United States;
- Changes in health care financing, including both funding of medical research and access to care; and
- Public policy efforts, from an increased multi-level advocacy focus to a wider range of public policy goals.

All of these dynamics are forcing voluntary health agencies to reinvent themselves to maintain a competitive advantage and meet their missions in the new century. Voluntary health agencies are looking at new ways of operating all their systems. Technology is challenging us to do things differently, at a faster pace, and with fewer slow bureaucratic processes. Voluntary health agencies are seeing the need to become lean and nimble in order to compete successfully.

The “Knowledge Age” is bringing us a blast of new, dynamic technologies that drive structure, culture, communication and product delivery. Hierarchical or traditional systems prove cumbersome and stand in the way of efficiency. Many voluntary health agencies are now flattening their structures and becoming customer-focused and community-driven, while facing continual challenges with more competition for resources — people and dollars. Things must be done better, faster, and less expensively, and customized to the individual needs of the respective consumer. The reality of change is that organizations will continually be seeking new, better, more cost-effective, more productive systems. Included in those systems must be improved ways to manage our vital volunteer human resources.

One new answer to the challenges facing voluntary health agencies is the development of *collabitation*. Collabitation, a word penned by the American Society of Association Executives, is when organizations form mutually beneficial strategic alliances with organizations that are viewed as competitors. To understand the value of collabitation, look at the airline industry in the late 1990s, where strategic alliances became industry standard. Airline companies remain competitors to fill seats, but at the same time, the airlines have found that more revenue is generated through expanding their network together in cooperative ventures. *From Grassroots through National*, funded and critiqued by over a dozen voluntary health agencies, is an example of collabitation within the voluntary health agency sector.

Viewed in the volunteer management context, collabitation means recognizing that volunteers do cross company lines in their volunteering role; a large number of people report volunteering for at least two different agencies. Those volunteers will make decisions on continuing with organizations based on the quality of the interaction. It is in the collective best interests of all associations to create and manage high-performance volunteer management systems to ensure top-notch, consistent ways in which we run those systems.

Thus, proactive, strategic redesign of volunteer management systems makes sense — from a bottom-line perspective, in order to be responsive to larger societal changes and trends affecting voluntary health agencies. Let’s look at how to begin to make those changes.

2

A SYSTEMS VIEW OF VOLUNTEER MANAGEMENT

Too often, volunteer and paid staff are treated as totally separate business units — or systems — within an organization. This chapter outlines ways that your organization can better integrate these two groups, as well as the enormous benefit this can have for your organization. This chapter contains a wealth of useful information for creating a more unified system of human resource management.

■ Jump Start

Consider the ways people work within your organization:

- What steps do you follow to initially bring paid and unpaid staff into the organization?
- Once these people are on board, how are they oriented to their work and the work of the organization?
- What things do you do to help a person become better at his/her role?
- How do you monitor work?
- How do you recognize and reward work?

Compare the way paid and unpaid staff are managed within your organization (see page 24).

- *Assess how well volunteerism is integrated in your organization by using the Paradigm Self-Assessment (see page 119).*
- *Increase volunteer and paid staff awareness of volunteer systems via a powerful experiential exercise (see page 26).*
- *Start a dialogue among volunteers and paid staff to examine the current system and look at ways to improve that system (see page 27).*
- *Look at one way to systematically integrate the volunteer function throughout a local organization (see page 91).*

ALL LEVELS

Learn techniques for integrating volunteer and paid staff management systems.

COMMUNITY

Learn how the volunteer management function can be integrated throughout a community-based organization. Use an experiential exercise and a structured dialogue session with your paid staff and volunteers so they can discuss how they are, or aren't, working in partnership.

STATE/REGIONAL

Compare your volunteer management system to nationally researched best practices.

NATIONAL

Examine how volunteer and paid staff systems mesh within your organization.

A Systems Definition

Any organization, no matter the size, has systems. All organizational procedures — how you order supplies, how you get paid, how orientation for new employees is conducted, how employee performance appraisals are handled — are systems, and they all are interconnected within your agency. The combination of these systems makes up your organization's culture, which is both written (by way of policy and procedure) and unwritten but documented (by staff conversation and daily practice).

Just as there are systems that cover practical logistics, there are people systems. These systems determine how people first come into an organization, what happens to them while they are there and how they exit the organization.

Historically, the people systems for paid and unpaid staff have been managed separately within organizations. Volunteer management has not been viewed as integral to the human resource function. Traditionally, many volunteer programs have been treated as peripheral to the larger organization. While it was acknowledged that volunteers did necessary work, their contribution was not seen as integral to other systems within organizations.

A systems perspective of volunteer management implies a paradigm that volunteers are integral to the mission, strategic plan, and business operations of the organization. This systems view recognizes volunteer management as part of an organization's overall human resource management system. This perspective places value on volunteers by viewing them as partners with paid staff, partners whose contribution goes well beyond the scope of any staff or volunteer position description.

◆ WIFY: Why is a Systems View Important?

The reality of change is that organizations will continually be seeking better, more cost-effective and more productive systems. Included in those systems must be improved ways to manage

both paid and unpaid staff.

Once you begin to view the process of volunteer management as an integral part of an organization's human resource function, you will begin to see the connectedness. If there is a misalignment or gap in any component of a human resources system, evidence suggests that it will also affect your volunteer management practices. The American Red Cross'

"Systems and processes drive employee behavior. In turn, systems and processes are driven by the culture. When systems, processes, and culture are misaligned, inefficiency, confusion, and frustration reign.... Culture dictates the aptitudes and skills needed in the workforce. Culture dictates how things work (systems and processes)....This is human capital management."

— Knowledge Management Isn't Just a Technical Job, Jac Fitz-enz, Workforce Online, February 29, 2000.

report, “Volunteer 2000,” highlights how a changing workforce affects volunteer administrative programs. A June 1991 *Training* magazine article asserted, even then, that corporate and nonprofit practices of human resource management would be best served by coordinating those practices within their own organizations. Coordinated, effective systems get coordinated results.

▲ Foundation

A systems perspective of volunteer management also is supported by the largest study to date of nonprofit volunteer management — The Points of Light Foundation’s 1991 *Changing the Paradigm* study. This national research of best practices identified 11 characteristics of highly effective volunteer programs. After nine years of extensive field testing of grassroots through national volunteer management systems, these principles still hold true. All of the 11 characteristics listed below (within the four action principles) confirm that volunteer programs are most effective when they are integrated at all levels, and within all systems, of the organization.

THE PARADIGM CHARACTERISTICS OF HIGHLY EFFECTIVE VOLUNTEER PROGRAMS

© THE POINTS OF LIGHT FOUNDATION, 1991

LAY THE FOUNDATION THROUGH MISSION AND VISION

This action principle examines the extent to which the organization has a core value for its existence that is communicated with, and shared by, staff and volunteers, and the extent to which there is a vision for how volunteers fit into the attainment of that mission.

- The mission and priorities of the organization are framed in terms of the problem or issue the organization is addressing, not its short-range institutional concerns.
- There is a positive vision — clearly articulated, widely shared and openly discussed throughout the organization — of the role of volunteers.
- Volunteers are seen as valuable human resources that can directly contribute to achievement of the organization’s mission, not primarily as a means to obtaining financial or other material resources.

COMBINE INSPIRING LEADERSHIP WITH EFFECTIVE MANAGEMENT

This action principle examines the extent to which the organization has administrative structures and clear direction, which will enable it to encourage and facilitate high impact volunteer involvement.

- Leaders at all levels — policy making, executive and middle management — work in concert to encourage and facilitate high impact volunteer involvement.

- While there is a clear focal point of leadership for volunteering, the volunteer management function is well integrated at all levels and in all parts of the organization.
- Potential barriers to volunteer involvement — liability, confidentiality, location of the organization, hours of operation, etc. — are identified and are dealt with forthrightly.

BUILD UNDERSTANDING AND COLLABORATION

This action principle examines the extent to which staff and volunteers are viewed as valued contributors to the organization and work together as partners in a team effort to accomplish the work of the organization.

- Paid staff is respected and is empowered to fully participate in planning, decision-making and management related to volunteer involvement.
- There is a conscious, active effort to reduce the boundaries and increase the teamwork between paid and volunteer staff.
- Success breeds success as stories of the contributions of volunteers — both historically and currently — are shared among both paid and volunteer staff.

LEARN, GROW AND CHANGE

This action principle examines the extent to which the organization is dynamically examining, and attempting to improve, its operation, including the continuous effort to broaden its volunteer base to include all segments of the community.

- There is openness to the possibilities for change, an eagerness to improve performance and conscious, organized efforts to learn from and about volunteers' experiences in the organization.
- There is recognition of the value of involving, as volunteers, people from all segments of the community, including those the organization seeks to serve.

For a more in-depth explanation of the Paradigm principles, see *Creating More Effective Volunteer Involvement*, by Ken Allen, The Points of Light Foundation, 1995.

The Points of Light Foundation has developed a self-assessment tool that organizations can use to assess how closely their organization is aligned with these principles (see *Changing the Paradigm Self-Assessment Survey*, page 119).

Applying the Paradigm Characteristic

What would an organization look like in which these Paradigm principles were applied? Below are indicators of an integrated volunteer management system. Take a few minutes to think about how your organization compares against these indicators.

Indicators of a Successful Volunteer Management System

© Sarah H. Elliston, United Way & Community Chest, 2400 Reading Road, Cincinnati, OH 45202

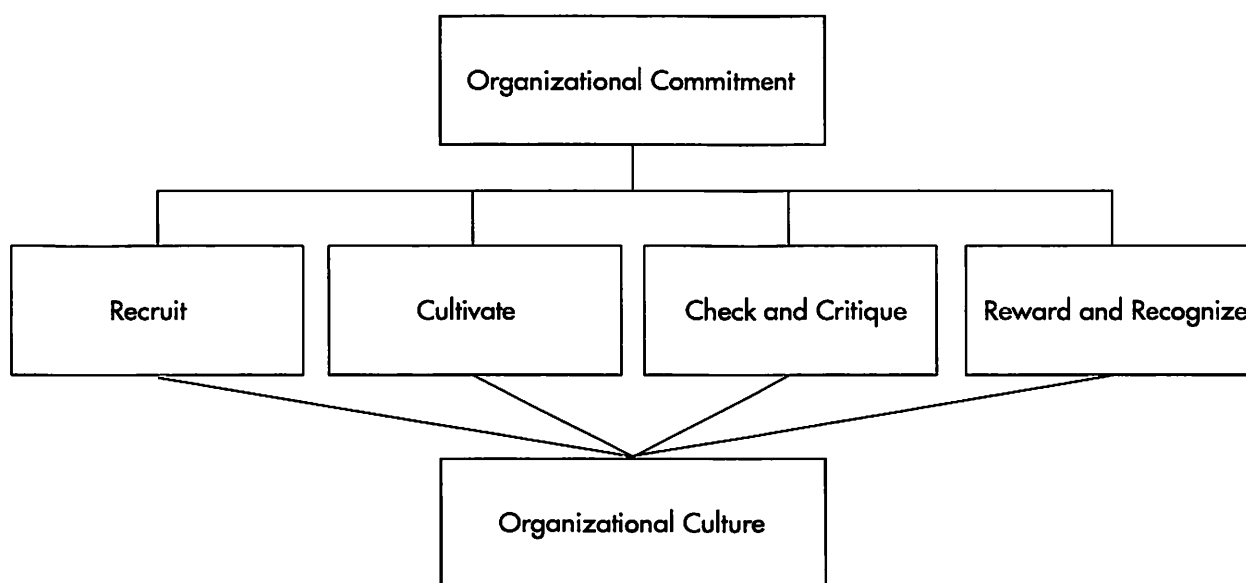
Indicator	Exists and Works Well	Exists but Could be Improved	Doesn't Exist
Policies are adopted by the Board for the volunteer program.			
Volunteer roles are directly tied to the mission of the organization.			
Volunteer roles are widely understood throughout the organization.			
All staff members are involved in identifying volunteer opportunities.			
Legal liability issues are addressed by all in developing volunteer opportunities.			
Paid staff and the Volunteer Coordinator develop written job descriptions.			
Volunteer recruitment is seen as everyone's responsibility.			
Volunteer recruitment is based on motivation of volunteers, not only agency needs.			
There is an integrated human resources system for all staff—both paid staff and volunteers. This includes interviews conducted with all potential volunteers and a screening, orientation, and training program in place for volunteers as well as paid staff.			

Indicator	Exists and Works Well	Exists but Could be Improved	Doesn't Exist
Paid staff work closely with, and in some cases supervise, volunteers.			
Volunteers and paid staff are included in the planning process.			
Paid and volunteer staff know and tell success stories of volunteers.			
Records of volunteers are kept up-to-date.			
Both paid and volunteer staff receive recognition and rewards for service.			
Volunteers represent all segments of the population.			

A Systems View of Human Resources

The Paradigm study highlights a critical need in the voluntary health sector: the need to craft a more business-oriented practice of staff managing volunteer systems. The following diagram presents an overall view of how organizations bring in and manage people within their organization. Keep in mind that each component is acted on in varying degrees within individual organizations. The purpose here is to shed light on whole systems and their interrelationships to each other.

Human Resource Architect System



© Sharon Koll & Associates 1999

Descriptions of Each Component

Organizational Commitment. For a system to function efficiently and effectively, the whole organization must be fully committed to making it happen. We have all worked for, or are aware of, organizations where some of the following processes have either not occurred at all or were practiced only occasionally. Keep in mind the Pygmalion effect, a management principle that states that people will do only what you expect of them — as you manage, they act out your implied expectations.

Recruitment. There are specific methods by which staff and volunteers are recruited or hired into an organization. What are the search process, the application process and the interview process? Are the knowledge, skills and behaviors critical to achieving the goals of each position reviewed periodically? How are position descriptions used in the organization?

Cultivation. Once a person is on board, how does he or she become knowledgeable about the organization and job? Who assists in the introductory period? Do people have opportunities for periodic meetings with the supervisor to “check in” on how they are doing in their role? How are people allowed to develop?

Checking/Critiquing. When a task/project is completed, how do people know about their particular performance in relationship to its completion? How is the performance appraisal handled? When a person leaves, is there an exit interview? Is succession planning addressed?

Rewards and Recognition. Aside from pay for performance, what other methods are used to reward people for their work? Is there a coaching/mentoring program? Personal development opportunities? Internal and external methods for recognizing stellar performance?

Organizational Culture. This refers to the basic environment of an organization — the way things are done. What is your organization’s culture in relation to how staff and volunteer systems are managed? Are some of the processes above ignored or avoided? Are the systems disjointed? What is rewarded and encouraged?

Walking the Talk

The exercise in the Toolbox on page 24 asks you to note those things that occur in practice. You can get an immediate sense of organizational issues by noticing what organizations *do*, not what they say they do. Try it yourself; be an observer. When you first walk into an organization:

- What do you see (lobby décor, seating or none, style of reception counter)?
- How are you greeted?
- When employees walk through, what do they look like? Do they smile?
Does anyone talk with you?
- What type of artwork, if any, is evident?

● Case In Point

One consultant tells of a visit to assess a company's customer service. He entered the basement where the department was located, then walked down a long hallway to enter the office. He was then faced with a chest-level customer counter, and had to stand on his toes and peer over to find assistance. What does this tell you of this organization's customer service culture?

People and Performance Work Practices

The flow chart (*see page 21*) and descriptions (*see page 22*) are a sample of an overall human resource work system or set of practices. Research conducted by the American Society for Training and Development suggests that a high-performing work system displays a great deal of synergy. That is, in high-performance systems, all of the human resource practices are aligned and fit together when people (in this case, staff and volunteers) are “energized, committed, and impassioned about their work.”



Toolbox

How Do Your Volunteer and Paid Staff Systems Mesh?

Describe what your organization currently does in each of the following processes. Check off whether it applies to staff, volunteers, or both. Make sure you list those things that occur in practice only.

Capture/Recruit Staff Volunteer Both

L I S T H E R E

Cultivate Staff Volunteer Both

L I S T H E R E

Check/Critique Staff Volunteer Both

L I S T H E R E

Rewards/Recognition Staff Volunteer Both

L I S T H E R E

ASTD's research also uncovered several key practices that appeared to occur frequently in companies that were successful. Some of the noted practices would no doubt occur less often in the nonprofit sector, as they are more conducive to the for-profit sector (for example, profit-sharing, gain-sharing, and knowledge-based compensation). Some of the practices found in the ASTD research that lend themselves well to the association environment are:

- Job rotation/sharing;
- Business process improvement;
- Tuition reimbursement;
- Individual development plans;
- Coaching and mentoring;
- Business information sharing;
- Incentive compensation;
- Employee involvement;
- Self-managed teams;
- New employee orientation training; and
- Annual performance reviews.

Why mention these? Why should nonprofit organizations measure themselves against for-profit business practices? For two important reasons. First, these practices can lead to organizations conducting their work in a more effective and efficient manner. All organizations need to examine and adopt those practices that improve their work.

The second reason for adopting for-profit business practices is that many volunteers come from that sector. In a recent meeting of nonprofit managers, a leading corporate executive challenged the attendees to ensure that their agency worked in a more businesslike fashion. He reported difficulties in placing his executives in organizations that had little sense of business acumen. The business leaders themselves did not want to serve as volunteers in a non-business environment, which they believed to be an inappropriate use of their time and talent.

Following are two Toolbox features that contain activities and discussions that can be used to help create dialogue on how well the volunteer management system is integrated within the organization.



Toolbox

Exploring an Integrated Volunteer Management System

This exercise helps people understand volunteer management systems and the relationship of mission, clients, paid staff, volunteer staff and board within that system. The purpose is to demonstrate how a volunteer program is part of the total organizational system and how people in systems are interdependent. Through this exercise, small groups create a three-dimensional sculpture that represents all of the roles and elements of a volunteer program.

Each small group should receive a stack of colored building blocks or similar sculpture-building toys. Instruct each group that their task is to create a sculpture that symbolizes a volunteer program. The sculpture should include the following elements: the paid staff, the volunteers, the clients, the board of directors, and the mission of the organization. Explain that after the groups create their sculptures they will have to present and explain the sculpture to the entire large group. Allow the groups at least 20 minutes to create their sculpture (the participants should have ample time to debate during the construction).

This exercise is based on the Paradigm Characteristics for effective volunteer programs (see page 18). To debrief this exercise, first review the Paradigm Characteristics. In debriefing, you are looking for how the participants interpret the relationships of people's roles within an organization to the organizational mission. Thus, the explanations and teaching points will come in your questions or observations of key ideas based on the placement of the elements listed above.

When the groups are finished with construction, have each group in turn explain their sculpture. The trainer can make many observations based on each individual sculpture. First, check to see if all the elements listed above are included in the sculpture (i.e., paid staff, volunteers, clients, board of directors, and mission of the organization). If not, ask why they have been excluded. Then, ask for an explanation of why certain items have been placed in physical relationship to another. For example, "I see that the volunteers and the mission are linked together in your sculpture. What are you saying about the volunteers' relationship to the mission?"

When all the small groups have finished presenting their sculptures, wrap up the exercise by asking the large group, "What was the purpose of this exercise?" Reinforce their answers by stating the purpose mentioned above.



Toolbox

Understanding Your System Through Dialogue

© Sarah H. Elliston, United Way & Community Chest

One quick way to explore how closely your volunteer program fits with a systems perspective is to have paid and volunteer staff examine how their systems currently work. The following discussion questions, developed by Sarah Elliston, can be used to explore both the current volunteer system and how it could be improved.

- What would be the indicators that your board is informed about, and supportive of, your volunteer program?
- Who might be confused about the role of volunteers in your organization? Why?
- If you had a task force to assist with planning, evaluation and recognition in the volunteer program, whom would you invite to serve and why?
- How would a volunteer in your program describe the ways the volunteer program serves your organization's clients?
- Can you list some of the obstacles to volunteer involvement that have been resolved in your organization? Some that haven't?
- What are some of the ways your volunteer program can enhance the paid staff's feelings of being respected and valued by the organization?
- List the ways in which your volunteer program is inclusive. How does it match the diversity of your neighborhood? Your clients?
- When was the last time the paid staff had training in volunteer involvement?
What content would you want included in such training?

3

ORGANIZATIONAL CHANGE MANAGEMENT

Volunteer systems must adapt in response to the current environment of changing organizations and changing societal trends. This chapter addresses how to effect change in a strategic, systematic way that takes into account the people and specific challenges of the organization.

■ Jump Start

Conduct a quick change scan:

- What is the most current organizational change that has affected your volunteer system?
- What do you need to help you address this change in your job as a manager of volunteers? Information, a change process, a leader who supports the change or strategies to help the volunteers?
- Do you know how this change is affecting the volunteers in your program? What current performance issues might be related to this change?
 - *Ways to address volunteer reactions to change (see pages 34-36).*
- How can you initiate and manage organizational change?
 - *A Volunteer Management System Change Process (see page 45).*
- What needs to change in the volunteer management system for it to be more effective?
 - *Change assessment suggestions (see pages 42-43).*
- What are you doing to get or maintain leadership support for the changes you need?
 - *Ideas for getting sponsors (see pages 38-40).*

Dealing with Change

Change. It's become our new shadow — constantly there, challenging us to increase our tolerance for uncertainty and to learn new ways to think and operate. Change pushes us to look straight into the unexpected and to see the opportunities that lie next to the dangers.

ALL LEVELS

Learn how volunteer and paid staff performance can be affected by change, and ways you can address those performance issues. Apply a step-by-step organizational change model. Look at your own attitude toward change.

COMMUNITY

Explore ways to address national and regional changes that may be negatively affecting local volunteers and paid staff. Look at ways to make improvements in your local volunteer-driven programs and events. Get and maintain a strong leadership sponsor (advocate).

STATE/REGIONAL

Learn how to roll out national level changes with minimal negative impact and maximum involvement of paid staff and volunteers. Discover ways to identify and correct problems in volunteer management programs.

NATIONAL

Use a step-by-step guide to design and implement national changes in your organization's volunteer management system and programs. Learn how to assess what really needs to be changed to build a more successful volunteer management system.

Change affects us on every level within voluntary health agencies. Consider:

- External societal changes that will affect the way voluntary health agencies operate;
- Reinvention and the subsequent disruption of voluntary health agencies as they restructure to thrive in increasingly competitive environments;
- Shifts in who volunteers, as well as how, when and why they want to volunteer;
- Ever-increasing workloads for people who manage volunteers; and
- The effects of all these changes on volunteer and paid staff.

The “down times” we once counted on to regroup are scarce, at best. And, if we’re honest with ourselves, we know that more, not less, turbulence lies ahead. The issue is not what’s in it for you *if* you change, but *how* you can change. The key to survival will be learning to steer through inevitable changes in a productive, strategic way that benefits you, your organization, and the volunteers within your system.

▲ Foundation

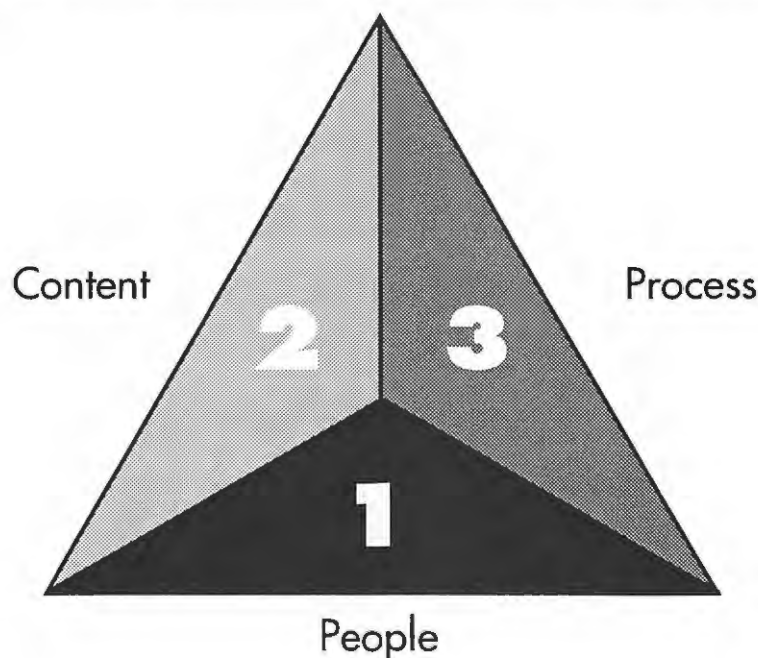
The field of organizational change management has produced many tools and approaches to help create systemwide organizational change. Within this field, the processes vary among practitioners. However, the following terms are common to the field of change management.

- **Organizational Change Management.** The field of study and application that addresses how change occurs in organizations and how to most successfully ensure that organizational change is effective from both a human and an organizational perspective.
- **Change Agent.** The person who implements change in the organization.
- **Sponsor.** Also called advocate, champion or change leader. An organizational leader who has the power to support and authorize the change. One sponsor can initiate the change; the same person or a different sponsor can maintain the leadership support necessary for the change to succeed.
- **Targets.** The people directly affected by the change. Also called stakeholders.
- **Communication Plan.** The blueprint for the ways in which change is presented to people in the organization.

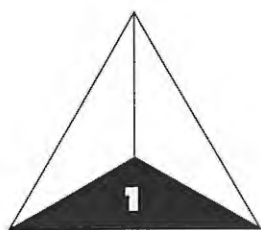
Welcome or not, the transition is upon you. How are you going to make the changes so that they are successful? How do you even know what to change and what to keep? What is your role in this? How are you going to address people’s resistance?

One way to organize the myriad issues of change is to think of change as three-sided.

1. **People.** Who will sponsor, lead, implement and be affected by the change?
2. **Content.** What needs to change so that the volunteer system can be more effective and integrated into the organization?
3. **Process.** How can you successfully implement a large-scale change?



People



Change affects all people in a system. In families, when something happens to one member, it creates a ripple effect until all family members are touched. Similarly, when a change is initiated within an organization, it affects all the people within that system. Volunteers and paid staff need involvement and an understanding of their role during the transition.

Within volunteer management systems, be sure to consider the following people during any change:

- **The change agent.** For most readers of this book, this is the person responsible for managing volunteers.
- **The targets.** These include volunteers and paid staff, and are those people most affected by the change.
- **The sponsor.** This refers to the person with the power to sanction the change. The change agent relies on the sponsor to support the volunteer system and the changes needed to improve it.

Change Agent

The change agent is the person responsible for implementing change. Often, there is more than one change agent involved in any major change in a large organization. In order to be most effective, a change agent should have the following characteristics in the listed areas.

1. Attitude

- A realistic attitude that is open and positive toward change.
- A commitment to care about the people affected by change.

2. Information

- An understanding of the dynamics of systems change.
- Resources for information on organizational change management.

3. Management Tools and Processes

- An understanding of what needs to be changed.
- A process to implement the necessary changes.
- A strategy for finding and maintaining a sponsor.
- Ways to address the concerns and resistance to change of volunteers and paid staff.

4. Competencies

Beyond tools and information, being a change agent requires certain competencies. The Sisters of Mercy list (*see page 47*) is one system's definition of staff competencies and values related to change. The competencies in Chapter 4 for staff who manage volunteers were created by voluntary health agency staff who must operate within constantly evolving workplaces.



Toolbox

Assessing Personal Attitudes toward Change

This assessment points to the responsibilities change agents have - to learn, to maintain their own health and positive attitude, to support the people they are leading through change. For every NO answer you give, think about whether changing this point would lead to you being more effective as a change agent.

Answer YES or NO to the following statements.

- I have stopped waiting for my work and organization to slow down. (I accept rapid change as part of the way I will need to work.)
- I understand (or am willing to learn) the patterns and dynamics of systems change.
- I am becoming more comfortable with ambiguity during times of change.
- I know how to take care of myself when the stress of change affects me personally.
- I understand how I resist change and the strengths and weaknesses of my change style.
- When faced with a change, I think beyond my own work survival to how I can help others through change.
- I take responsibility for managing my own morale during changes.
- When I become negative about a change, I am able to rise out of it and disagree with my own negativity.
- I accept that people's reactions to change vary widely, and I am comfortable listening to other people's resistance to change.
- I am committed to making change as safe as possible for the people it affects.

People's style in addressing change comes from personality, culture, and past experience. One way to understand the way you cope with change and to learn more about your work team's coping styles is to use personality assessments or typologies, such as the Myers-Briggs Type Index. Sharing the results of such assessments with team members can be the start of group discussions on what you need during change and how you can support each other during times of upheaval and transition.

Targets

At first glance, the people directly affected by change (the targets) often appear to be the casualties of change. In reality, targets hold tremendous power during an organizational transition. They can buy into it, sabotage it, or leave the organization.

It is normal for people to exhibit a variety of unsettling behaviors during organizational change. The following examines typical reactions that paid staff, and particularly volunteers, may have toward change and how managers of volunteers may address those reactions.

VOLUNTEER AND PAID STAFF REACTIONS TO CHANGE

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Expecting volunteers and paid staff to feel reluctant, skeptical, and threatened by change is the key to helping them through it. Apprehension and concern about reasons behind the change are normal reactions. The most immediate concern is, “How will this affect me and what does this say about my contributions?”

The more you make people feel they have an instrumental role to play in creating the “new” working environment, the more you can minimize resistance. With this crucial point in mind, the following will assist in identifying where staff and volunteers may be having a difficult time, and suggest options for drawing them into the process. Most individuals in the midst of transition experience some or all of the following in varying degrees.

1. Loss of Identity - People lose focus of how their individual roles contribute to meeting the mission.

Signs:

- Staff and volunteers display an extreme need for hierarchy and want to know who is in charge.
- Staff's and volunteers' frustration and concerns increase.
- Staff and volunteers feel their contributions are not recognized and that they have no place in the organization.

Options for Managers:

- Formally recognize past and present contributions.
- Create a process for staff and volunteers to use to redefine their roles within the context of change (e.g., develop new job descriptions or suggest new teams or a revised organizational structure).
- Tie tasks and outcomes to mission.
- Clarify the decision-making process.
- Continually encourage staff and volunteers to share what they have learned.

2. Withdrawal

Signs:

- Staff and volunteers tend to avoid opportunities for dialogue or discussion.
- Staff and volunteers may fixate on routine or administrative tasks that pertain only to their role or program area (to stick with what they know).
- Staff and volunteers fail to show up; staff call in sick more often.

Options for Managers:

- Have non-threatening, one-on-one discussions with staff and volunteers.
- Assure everyone that questioning the rationale for change and sharing concerns are part of the process.
- Give individuals specific roles and responsibilities in the change process.

3. Disorientation

Signs:

- Staff and volunteers may just “show up” to work, meetings, activities, and events, exhibiting little initiative.
- Staff and volunteers do not act unless told to perform a specific function.
- Staff and volunteers act distracted, sit in a stupor, or do not follow conversations.
- Staff and volunteers increase the number of coffee and food breaks or other comfort-associated behaviors.

Options for Managers:

- Outline how the organization expects staff and volunteers to participate in redefining roles.
- Provide time and a structured process for reflecting on personal and career goals, affirming and acknowledging individuals’ strengths and expertise.

4. Negativity

Signs:

- Staff and volunteers become protective of their “turf.”
- Staff and volunteers increase sarcastic comments during meetings.
- Staff and volunteers rally others behind the scenes to question the rationale for changes.
- Staff and volunteers look for a scapegoat upon whom to blame change.

Options for Managers:

- Address and dispel rumors openly.
- Acknowledge frustration as normal.
- Revisit the rationale for changes.
- Share examples of similar change in other organizations.
- Give those most negative a role outside their program area or “turf.”

In summary, resistance is related to the level or degree of loss an individual may experience with change. This varies for every individual and within every organizational culture. Staff and volunteers may ultimately react to one or a variety of perceived losses during a time of transition. Creating staff and volunteer ownership of the learning process increases openness to change and is the key to reducing extreme long-term resistance.



Toolbox

Exploring Personal and System Reactions to Change: The Rope Exercise

Sometimes it takes a direct approach to get staff to talk about change. One non-threatening way to do this is to create an opportunity for people to discuss their change styles without having to personalize their reactions to their current organizational situation. The following experiential exercise, compliments of Charlie Seashore, a national leader in the field of organizational development, is designed to have people look at change within systems and their reaction to it. It also helps people see how other people's reactions to change may be vastly different from their own.

In this exercise you will ask a group of people to stand and hold onto a large rope that is knotted into a large circle. With little instruction, other than asking participants to stand holding onto the rope, the group will begin, proactively and reactively, to move the rope. These actions will provide the basis for a discussion on peoples' actions and reactions to change. Please note that although it seems the instructions do not give the group enough direction, these instructions have been tested and they do work. Invariably, group members will take the initiative to start moving without direction within 10-15 seconds. One of the goals of this exercise is to see who does take charge without instructions, as this is one personality style within a system.

1. Set up the exercise.

On the floor, place a large rope that is tied into a circle. The rope should be long enough for all the participants to hold onto it comfortably. Ask the participants to gather around the outside circle of the rope. Give the following instructions to the participants.

Organizations, like families, are systems — an interdependent group acting as a whole. This rope represents a system. So, we'd like you to hold onto the rope and see what happens, as you are involved in a system. The ground rules are:

- You may not speak at any time.
- You may move about as you please as long as you continue to hold the rope.
- You cannot hurt anyone with the rope.
- You should pay attention and observe what occurs.

2. Conduct the exercise.

Ask the participants to bend down and grab hold of the rope that is at their feet. Explain that they will have five minutes to move how they want, but they must obey the ground rules. Then stand back and observe what the group does. Although these instructions to the participants seem sparse, they are enough for the group to start moving on their own. Very quickly, the group will begin elaborate moves and forget you, the facilitator, are there. Only interrupt the group if someone starts talking or hurting another person. After five minutes, signal that they can let go of the rope.

3. Debrief the exercise.

Ask the large group the following:

- When you were on the rope, how did you influence people and how were you influenced?
- What did you notice about the different ways people related to the system, i.e., the rope (helping, withdrawing and competing)?
- What did you notice about yourself?

4. Wrap up the exercise.

Point out to the group that all of the people in the room are part of systems and all are affected as they move through changes. An awareness of how change affects you can help you both cope better with change and be more aware of other people's coping styles.

Sponsor

The third crucial person involved with change is the sponsor. The sponsor is the person with the power to legitimize the change. You must have a sponsor to implement successful change. Everyone can name times they have seen smart ideas and innovative projects fail because no one in leadership stood behind those ideas/projects.



Toolbox

Critical Sponsor Qualities

The following quiz lists important qualities to look for in a sponsor. Answer YES or NO for whether your sponsor fits the following statements. (If you don't have a sponsor, see Help, I Don't Even Have A Sponsor! on page 39.)

My sponsor:

- Believes that the volunteer program is integral to the mission and goals of the organization.
- Sees and believes in the need for change.
- Has the power to authorize change within the volunteer program.
- Knows what has to be done for this change to be successful.
- Understands how the change will impact the volunteer management system.
- Appreciates what volunteers and paid staff are being asked to do and how the change will affect them.
- Understands the time, money, and energy the change will cost the volunteer management system (i.e., the necessary resources), and is willing to pay this price.
- Demonstrates support for the volunteer management system and changes to that system.
- Understands the need for board commitment and involvement.
- Is willing to support the change over the long haul.

For each YES answer score 1 point, for each NO score 0.

8 - 10 points: You're lucky to have this level of support. See *How Do You Grow a Good Sponsor?* (see page 40) for ways to keep your sponsor involved.

5 - 7 points: You've got some work to do. See *How Do You Grow a Good Sponsor?* (see page 30) to plan ways to increase your sponsor's support and involvement.

4 or fewer points: You're in trouble! You need to come up with a plan to re-educate your sponsor (see *How Do You Grow a Good Sponsor?* on page 40) or get a new sponsor (see *Help, I Don't Even Have A Sponsor* on page 39).



Toolbox

Help, I Don't Even Have A Sponsor!

If you don't have a sponsor, how do you get one?

1. Assess your organization's culture towards the volunteer management system (through the Paradigm Self-Assessment in the Appendix, a focus group, staff survey or informal discussions). How do other people in your organization perceive the volunteer program? What is its reputation and perceived value?
2. Understand the value of your volunteer management system to your organization. Answer the following questions.
 - What is your organization's mission statement?
 - What part of the mission statement can volunteers support most effectively (keeping in mind your organizational culture)?
 - What are your organization's current goals?
 - Which organizational goals can volunteers best support (keeping in mind your organizational culture)?
3. For each goal you identify, write a supporting statement or a departmental goal statement and link it to the organizational goal statement.
4. Identify a leader in your organization who you would like to act as sponsor for needed change within the volunteer system. Try to learn from others what is of value to this person, and see if it aligns with the goals you've identified. Also, try to learn what this person's preference is for receiving information. Does he/she value concise oral presentations, complex systems and process diagrams, or numbers that show quantitative value?
5. Assess the impact of the proposed change (on members, staff, culture, goals, resources, timeline and budget) and be prepared to present this to the sponsor.
6. Be clear on what you want to ask from the sponsor (see Critical Sponsor Qualities, page 29).
7. Prepare a presentation that includes all the above information in the style the sponsor prefers.
8. Meet with the sponsor to sell your proposal.



Toolbox

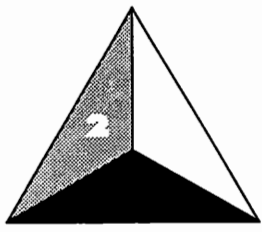
How Do You Grow A Good Sponsor?

Never take a sponsor for granted. For many reasons, sponsors can change their allegiances daily. Thus, work to maintain and strengthen their support. The following are some ways to do this:

1. Keep your sponsor informed — provide information on how the changes and the volunteer management system in general are of value (both qualitatively and quantitatively).
2. Report back regularly on progress.
3. Work to build a relationship of trust — be honest with your sponsor and do what you say you are going to do.
4. Create a sponsor succession plan — court and educate co-sponsors who can quickly be moved into the sponsor role.
5. Look (or ask your sponsor) for ways you can support your sponsor's agenda within the organization.

The Content of Change

A vital aspect of facilitating change is to know what really needs to be changed. Change is difficult and costly to implement. Thus, it should not be undertaken only because it sounds like a good idea, or it fits a current management fad. Change should be necessary, feasible and result in substantive improvements to the mission of the organization.



Within an organizational system, areas that can be changed (and affected by change) can be divided into the following categories:

- Organizational structure;
- Strategy;
- Process;
- Culture;
- Product; and
- Service.

Following are examples of these changes in hypothetical volunteer management systems.

Organizational structure. The current Volunteer Director is responsible for supervising 70 volunteers. For several reasons, it would be more effective to decentralize the volunteer supervision function. Volunteers are supervised by someone — another volunteer or paid staff — who works directly with them. Thus, the volunteer management system is being restructured with new roles for staff in volunteer supervision and evaluation.

Strategy. The traditional way to recruit volunteers has been through family members and friends affected by the disease addressed by the agency. The agency has determined it needs to change its recruitment strategy to attract potential volunteers with highly technical skills who may not have a personal relationship to the disease.

Process. The volunteer program has grown so big that the Volunteer Director is having a difficult time manually tracking volunteer hours and data. A computerized system in which volunteers log their own hours on a kiosk touch pad will be installed at all volunteer sites.

Culture. An analysis of diversity within the volunteer program shows that non-Caucasian volunteers do not feel welcome or respected by the dominant group of Caucasian, middle-aged volunteers. Leadership has decided that the way current volunteers act toward new volunteers needs to be changed so that the program can be more inclusive.

Product. A new series of educational books on how families can deal with a specific disease will be released at the local field level. Volunteers will be needed to disseminate these books through a promotional campaign.

Service. A volunteer program that conducts home visits to persons with a specific disease has determined that there is a need for patient advocacy with health-care providers for these same persons. They would like to start an advocacy and information service staffed by volunteers.

Where Does the Change Come From?

Changes to a volunteer management system can:

- Come from the larger organization (outside the unit responsible for leadership of the volunteer program).
- Be precipitated by a problem or crisis that needs to be addressed.
- Be due to an assessment that points to problems or areas to improve.
- Come from a desire to make a good program even better.

Many times, changes to a volunteer system are imposed by other areas within the organization. Then, the role of the manager of volunteers is to use the external change to advocate beneficial changes in the volunteer system.

How to Determine the Change Content

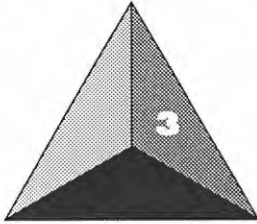
No matter their source, changes can be used to leverage improvements in the volunteer management system. There are several tools and processes that can be used to examine what needs to be improved within a volunteer management system.

- The results of your volunteer management system's evaluation measures and program data are the first place to begin to examine how to improve the program. (For a list of evaluation measures for volunteer management systems, see Chapter 7.) Poor volunteer performance

reviews, negative customer feedback, a low return on investment for certain processes, unmet objectives, low job satisfaction and low volunteer retention rates can be red flags.

- The Paradigm Self-Assessment (see Appendix) is an excellent tool to assess paid and volunteer staff perceptions of the effectiveness of the volunteer management system. The Paradigm is based on researched benchmarks of best practices within volunteerism.
- *The Volunteer Management Audit* by Susan Ellis (see Bibliography) is another tool. The *Audit* examines an organization's effectiveness in involving volunteers by comparing the program against 13 elements for successful volunteer programs.
- Conducting focus groups with the change targets and program constituents can be a powerful way to explore how to improve a volunteer management system. When designing the focus group questions, explore possible improvements to organizational structure, strategies, processes, culture, products and services.
- To determine the root cause of problems, there are several process improvement tools, including the fishbone analysis and force field analysis (see *The Team Handbook in Bibliography*, page 115).
- Indicators of an Effective Volunteer Management System (see page 19) can also be the basis for assessment questions (or discussions) on how well the system compares against external benchmarks. Ask yourself:
 - *Have policies been adopted by the board for the volunteer program?*
 - *Are volunteer roles directly tied to the mission of the organization?*
 - *Are volunteer roles widely understood throughout the organization?*
 - *Are all staff members involved in identifying volunteer opportunities?*
 - *Are legal liabilities addressed by all in developing volunteer opportunities?*
 - *Are there written job descriptions for volunteers?*
 - *Are volunteer job descriptions based on competencies needed to perform the job?*
 - *Is volunteer recruitment seen as everyone's responsibility?*
 - *Is volunteer recruitment based on motivation of volunteers, in addition to agency needs?*
 - *Are interviews conducted with all potential volunteers?*
 - *Are screening, orientation and a training program in place for volunteers?*
 - *Do paid staff work closely with, and in some cases supervise, volunteers?*
 - *Are volunteers and paid staff included in the planning process?*

- *Do paid and volunteer staff know and tell success stories of volunteers?*
- *Are records of volunteers kept up-to-date?*
- *Do paid staff receive recognition and rewards for volunteer management?*
- *Do volunteer staff receive recognition and rewards for their service?*
- *Do volunteers represent all segments of the local community, particularly those customers they are serving?*



The Process of Change

The third side of change involves a process for designing and implementing the change. There are dozens of change processes. However, there is no single, ideal change process that fits all real-world situations. The objective of any change methodology should be to motivate people to move in the right direction. Almost all change

processes include certain critical success elements.

Critical Success Elements

- A bottom-line reason for urgent and compelling action (translated into a vision for the future).
- Effective sponsors and change agents.
- A communication plan that explains the change and fosters open dialogue and information among organizational units (i.e., work groups, departments, teams).
- A systematic, focused approach and analysis (i.e., a strategy for implementing the change).
- Processes and procedures to facilitate change management.
- Consideration of current culture and what must happen to accommodate the change.
- Use of teams to get buy-in.
- Identification of, and training in, staff skills necessary to implement the change.



Toolbox

A Volunteer Management System Change Process

The following change process can be used as a step-by-step guide to help staff navigate change. You may use this guide as an outline to organize a written change plan, as questions to ask a change planning team, or as the basis for your own personalized strategy as you set up and manage a change initiative.

PREPARE FOR THE CHANGE

Define and prioritize urgent and feasible organizational change.

- Define what really needs to be changed (see pages 42-44)

Create an organizational vision of the change.

- Determine what the future should look like after this change has been successfully implemented.

Assess the value and impact of the change for the volunteer management system and the organizational system as a whole.

- Assess the impact of the change on members, staff, culture, goals, resources, budget and programs.
- Answer the following:
 - What disruptions will occur to daily work and operations?
 - What will be the costs and benefits of this change in terms of time, energy and money?

Analyze areas of resistance.

- Address the following:
 - Who may resist this change?
 - How might they react?
 - What responses can you give to their resistance?
 - What proactive actions can you take to minimize resistance?
- Consider the common causes of resistance: fear; low energy; history with previous painful, failed changes; inertia; people not knowing their personal payoff for changing. What can you do to address these issues?
- Identify the change agent (person who implements the change), sponsor (person who authorizes the change) and key targets (people directly affected by the change). Create strategies for their involvement. See Critical Sponsor Qualities, How Do You Grow A Good Sponsor? and Help, I Don't Even Have A Sponsor! (see pages 38-40).

- Sell the value of the change to sponsor(s) by being able to address its impact and benefits.
- Ask the sponsor for specific concrete action items you need from him or her.
- Assuming you are the change agent, prepare yourself by finding a strategy you will follow (see list of critical success factors for a change process, page 47), gather all the information you need and get lots of rest!
- Identify how to involve key targets (including volunteers) in implementing the change and how the change process can empower **all** targets.
- Involve targets. Some ideas for doing this include: bringing problems concerning them to the targets for their solutions; getting the targets to create the specific tools and processes that they will need for the change; and creating target teams to address change-related issues such as how to reward targets and how work teams can minimize the stress of the changes.

Set up teams to implement the change.

- Be clear about the teams' roles, mission and to what extent they have the authority to do what needs to be done. An excellent resource for building effective teams is *The Team Handbook* by Peter Scholtes (see *Bibliography*, page 115).

Create a change plan.

- Include strategies, goals, outcomes, contingencies, communications, resources, timeline, training (if necessary), personnel, rewards, celebration and evaluation.

(Toolbox continued on page 46)

A Volunteer Management System Change Process *(continued from page 45)*

CARRY OUT THE CHANGE

Announce the change both horizontally and vertically.

- Remember to communicate the change to all volunteers.
- Use every way possible to constantly communicate the new vision and strategies.
- Explain how and to whom people in the system can direct their questions and issues about the change.

Train people (if necessary).

- Address the following:
 - What new competencies will be needed for the change to be successful?
 - Who needs these competencies?
 - When will they need to be trained?
 - What is the most efficient and cost-effective way to train them?

Monitor progress towards goals.

- Create predetermined measures and regularly measure progress toward specific goals. Correct course if needed.

Monitor the effects of the change on paid staff and volunteers. Take supportive actions as needed.

- Be sensitive to an increase in stress-related behaviors that correlates with the timing of the change and take action if warranted (*see Volunteer Reactions to Change, pages 34-36*).

- Create opportunities to discuss the change and its effects.

Celebrate and communicate successes.

- Visibly recognize people who make "wins" possible.
- Communicate success stories.

Reward targets.

- Reward and recognize peoples' efforts with what is of value to them.

Evaluate the change.

- Assess the results, benefits and costs of the change. See Chapter 7 for information on tools for process and program outcome evaluation.
- Involve sponsors, change agents and targets in recording the learnings from the change. This documentation can provide valuable ideas for the process and content of the next change initiative.

WHAT DO PAID STAFF AND VOLUNTEERS NEED TO THRIVE IN A CHANGING ORGANIZATION?

THE SISTERS OF MERCY HEALTH SYSTEM COMPETENCIES FOR PROSPERING DURING CHANGE

Many organizations are consciously examining those values and competencies that paid and volunteer staff need to thrive in a constantly changing environment. In 1994, the Sisters of Mercy Health Care System began a large-scale organizational transformation to meet the increasingly complex and competitive environment of health care. One product of their change initiative was a list of key values and competencies that each member of the Sisters of Mercy staff needs to be a productive worker within a constantly evolving workplace.

- **Mission integration.** Knows the mission, vision, values and guiding principles of the organization; aligns personal beliefs and values to bring congruence and meaning to day-to-day work.
- **Organizational commitment.** Aligns own behavior with the values, needs and priorities of the organization. Considers the common good as well as individual desires.
- **Service orientation.** Has a genuine desire to help others, especially those in need. Derives real satisfaction from serving others. Understands people's needs and emotional state and overcomes obstacles in serving them.
- **Attitude toward change.** Adapts to, and works effectively with, a variety of situations, individuals and groups. Recognizes the positive dimensions of change and copes effectively with its threatening aspects. Initiates useful change within own sphere of influence.
- **Personal effectiveness.** Takes initiative to do more than is required in a job. Expresses self-confidence in stating opinions and making decisions. Handles failures constructively.
- **Achievement motivation.** Sets challenging objectives and works against self-defined standard of excellence to continually improve personal performance.
- **Learning orientation.** Values and seeks opportunities to learn. Knows the history and stays up-to-date on the current state of the health care industry and the institution. Collects and uses information relevant to work-based problems. Learns from own and others' mistakes.
- **Interpersonal and team performance.** Builds and maintains positive relationships with people on the job. Listens effectively to understand others' thoughts, feelings and concerns. Works cooperatively with others as part of a team; puts group goals before own.
- **Respect for differences.** Recognizes and appreciates differences in style, approach and background. Sees opportunities for creativity and innovation by using diverse resources.
- **Quality focus.** Minimizes errors and maintains high quality by checking or monitoring data and work, and by developing and maintaining systems for organizing work and information. Actively explores ways to improve quality of output.

CHAPTER 3

- **Problem-solving effectiveness.** Uses data and analytical thinking to identify problems and develop solutions.
- **Task accomplishment.** Acts resourcefully to ensure that work is accomplished within specified time and quality parameters. Is able to focus on more than one task, project or person's needs at a time.

4

CRITICAL COMPETENCIES FOR MANAGERS OF VOLUNTEERS

Competencies are a combination of sets of skills, related knowledge and exhibited behaviors that lead to a person's successful performance. Identifying critical competencies can guide the processes for recruitment, job profiling, performance appraisal, growth and development and team assessment.

■ Jump Start

Take a look at your existing position descriptions for the staff and volunteers of your association. Ask the following questions:

- When were they last reviewed?
- Has your organization restructured or changed strategic plans? Did the position description review process occur before or after the changes?
- How was the review process carried out? Did both the pertinent staff and/or volunteer and supervisor get involved in the review?
- Do they accurately reflect the current work of the organization?
- Do they state the required knowledge, skills and activities that are necessary to achieve success now?
- Did you have discussions about what it will take to succeed in this position in the future?
 - *Learn how the traditional view of jobs has evolved (see page 50).*
 - *Practice developing competencies for a volunteer or paid staff position (see page 54).*
 - *Compare yourself against nationally tested competency models for staff who manage volunteers at local, regional and national levels (see pages 58-60).*

◆ WIIFY: Understanding Competencies

Many position descriptions take into account the specific details of a job without delineating the behaviors or attributes needed to perform the job skills. Instead, they provide a basic list of things or actions tied to a job title. You will be more effective in matching the

ALL LEVELS

Gain an understanding of the difference between skills, tasks and behaviors. Learn the definitions of competencies developed for all levels in the staff pyramid.

COMMUNITY

Learn to develop position descriptions that address both critical skills and the characteristics of people who possess those skills. Review tools you can apply to current projects and use in your own personal development.

STATE/REGIONAL

Learn the process for defining types of staff you should be hiring at various levels for program management. Define types of volunteers required for different projects.

NATIONAL

Learn how to develop a global human resource strategy that embodies both skills and behaviors.

right person to a job by understanding and exploring the behaviors critical to the accomplishment of the job, rather than simply asking if the applicant has raised money or run an event before. When interviewing for both paid and volunteer positions, you need to understand what led that applicant to be successful in having raised money or run the program. When you understand the basic concepts behind competencies, it will lead to better recruitment of volunteers. Equally important, it will enable you to personally build on your own competencies to succeed in the world of volunteer management.

▲ Foundation

Do you work, or do you have a job? Most of your time probably revolves around organizing work that needs to be done. You manage tasks that are implemented through project-focused workgroups (sometimes called teams). The old way of organizing work through jobs is rigid – it funnels people into job categories without flexibility for crossover. One aspect of the changing world of work is that jobs have evolved into multiple projects that are constantly changing.

In looking at competencies, you are looking through a new window to determine how you will accomplish work, with a group of people, in a specified timeframe, with very specific performance expectations.

Jobs will not be around forever, and neither will the people who work in them. The new goal of organizations will be in determining very quickly what work needs to be done and what people can be quickly assigned to a project to successfully achieve desired outcomes. When you determine that you want volunteers to fill positions, your first question should be, “Does this volunteer have the skills and competencies I need right now to accomplish this task?” Successful recruiting will result in many short-term, episodic volunteers with the competencies needed for an immediate task.

Definitions of Terms

Before moving ahead with a specific position description, here are some definitions of terms we'll be using:

COMPETENCY

A composite of skills that can be measured through specific behaviors and can lead to successful accomplishment of desired outcomes.

CORE COMPETENCY

Those organizational competencies that can be leveraged for increased success. These are used to describe overall corporate or cultural behaviors and not individual behaviors.

BEHAVIOR

What people do or say, both verbally and non-verbally.

SKILL

A consistently demonstrated ability to perform certain physical or mental tasks or job activities.

KNOWLEDGE

What people comprehend and understand.

TRAIT

What people are predisposed to do – an underlying behavioral tendency.

JOB COMPETENCE

The person's ability to meet or exceed the expectations of the job at an expected level of quality.

STALLERS AND STOPPERS

Those behaviors that could get in the way of a career either in a particular organization or specific area.

Moving From Task Lists to Competency Modeling

Either individually or with a team member, briefly jot down a list of your “to dos” for today or this week. These can be work and/or home related.

- Example:
- Install new software on computer.
 - Call potential funder about a grant to submit.
 - Write paragraph about new program for in-house newsletter.
 - Orient new chair of the event committee.
 - Take car in for oil change after work.
 - Put tape in VCR to record program while out this evening.

Review your list, and think about how you will know when each task is completed. Then, write down your measure of a job well done, such as:

- Software is loaded and can be used.
- Talked with funder and secured information to prepare grant.
- Paragraph written and downloaded to newsletter editor; grammar and spell-check completed.
- Met with new chair and spent two hours reviewing position description; chair asked good questions and we both feel confident about committee direction.
- Managed to get car in before garage closed and got oil changed.
- Read manual, put tape in and taped the program.

Next, look at the tasks and success measures and think about what types of skills, and behaviors that reflect those skills, an individual must possess to be able to achieve the tasks. For example:

Skills	Examples of Skill-Related Behavior
Verbal communication	Speaks in a manner that is clearly understood by other people.
Written communication	Writes about a topic in a succinct, error-free style that is understood by other people.
Sizing up people	Correctly assesses people’s actions based on observing verbal and nonverbal cues.
Time management	Schedules individual tasks and is able to meet that schedule.
Technical ability	Correctly uses the technology for its intended purpose.

You have now identified what competencies will be needed to complete the tasks successfully. This is known as competency modeling. Remember, competencies are those sets of skills, related knowledge and exhibited behaviors that lead to a person’s successful performance.

Working with competencies can lead people to think that measuring and managing only behaviors is paramount in the process. However, it is critical to consider the skills in relationship to the behaviors to complete the process. Never lose sight of the fact that the end results, or the achievements, are what you should use to measure success. If you learn to work backward from the desired end result, you can determine the competencies that will lead to that result. If desired accomplishments don’t happen, critical competencies were not present or not used.

The Roots of Competency Development

Although there was much discussion about competencies in the 1990s, the concept has its roots in the early 1970s. Psychologist David McClelland was asked by the United States Foreign Service to develop research methods that would predict job performance that were not biased by race, sex or socioeconomic factors. McClelland had to explore this issue: If traditional aptitude measures don't predict performance, what really does? Using tested models of research, he compared superior performers with those who demonstrated average or adequate performance. Through discussions with individuals, he uncovered specific information about thoughts, ideas, actions and concrete day-to-day examples about on-the-job situations.

Given this body of information, McClelland's goal was to create a methodology that an organization could use to more effectively match the right person to the right job. As a psychologist, he looked for those things that would be predictors of success. He believed that if he could determine those predictors, he could create human resource systems that would allow organizations to hire to those predictors.

McClelland's research laid the groundwork for organizations to use in developing approaches to hiring people based on their competencies. There are now many systems available that enable an organization to define job competencies.

Defining Competencies around Current and Future Needs

Listing desired competencies for people already in a position is essential so they can have information about what they can do immediately to achieve higher levels of success. Employees and volunteers should work together to develop a list of competencies associated with their jobs — both those competencies they possess and others they may need to acquire. It is essential to develop a process where incumbents have the opportunity to acquire those competencies in which they need growth.

When first drafting competencies, it is important to look at those skills and behaviors that will be critical to either continued success in the current position or in a new or modified position with different expectations.



Toolbox

First Steps in Competency Modeling

The most critical component of developing competencies is the conversation that occurs prior to the process itself. As rudimentary as this may sound, this is the only way in which you ensure the validity of the final result. Following are three recommended conversation steps leading up to the actual competency modeling process. These conversation steps take approximately 45 minutes to one hour. It is helpful to have someone outside the realm of the position, such as a Human Resource staff person, facilitate the discussion.

Step 1. Discussion about the Position

Gather people who are familiar with the position and who understand what successful completion of the responsibilities entails. Establish benchmarks for the position by reviewing the outstanding performance of others. List your points on a flip chart so participants can gradually see the depth and breadth of a position. This discussion should begin with the following:

- What are the end results of performing this position?
- What are the success criteria? Describe what a job well done looks like.
- Describe some major outcomes from this position.
- Describe some performance standards that allow you to measure outcomes.

Step 2. Challenges of the Organization

Utilizing the same discussion group, answer the following:

- Describe the nature of the organization and the relationship of the position to the goals of the organization.
- Identify challenges in the business environment (both current and future) that can impact the expected outcomes of this position.
- Describe some internal business challenges the incumbent will face; for example, is there an expected reorganization? How does decentralization affect this position?

Step 3. Challenges of the Position

In continued discussion, ask the following:

- What were obstacles in the past that prevented people from achieving the outcomes of this position?
- Which barriers, if overcome, will provide for greatest improvement?
- What are foreseeable issues for future performance?

● Case In Point

In one association, every position description was being rewritten. This organization was undergoing significant changes due to shifts in technology and increasing competition from other associations that provided similar programs and conducted similar fund-raising activities. As the human resource director worked with the executive director and the assistant executive director to rewrite the assistant's description, significant conversation ensued, somewhat embattled, on the role and responsibility of the position. When the competency modeling process was completed, consensus was achieved, and the competencies defined truly reflected each person's expectations of performance. At the same time, an ongoing difference of opinion about roles was resolved.

Defining Competencies for Managers of Volunteers

Now that you have had the opportunity to look in-depth at the position or position category, you can begin to craft the competencies critical to the successful completion of the job. Many materials in the field of volunteerism speak to the development of the volunteer. While volunteers are critical to success, staff abilities to manage in this volunteer environment are equally essential to the organization's success. For many years, the focus of training and development, from an organizational standpoint, has been skill based (e.g., how to conduct a major gifts program or organize a self-help group). Little if any focus has been put on the competencies needed to manage volunteers assisting with the fund-raising or self-help group.

Again, the Paradigm study emphasized the need to more effectively manage the volunteer system. *Grassroots through National* focuses on the competencies for you, the manager of volunteers, in a more systematized fashion. This information can also be used when defining all unpaid (volunteer) positions. The more you create similar processes for both paid staff and volunteers, the more consistent the implementation.

Grassroots through National describes the background, rationale and process for developing competencies. The process we describe will get you started in developing competencies. It is important at this point to select one of the many off-the-shelf competency tools that are available to use as part of the competency development process. In addition, some organizations create their own customized competency systems.

Most competency tools have multiple uses, including recruitment, job profiling, performance appraisal, growth and development, and team assessment needs. Use of a standard instrument creates a common language for organizations to use as they go through competency modeling processes.

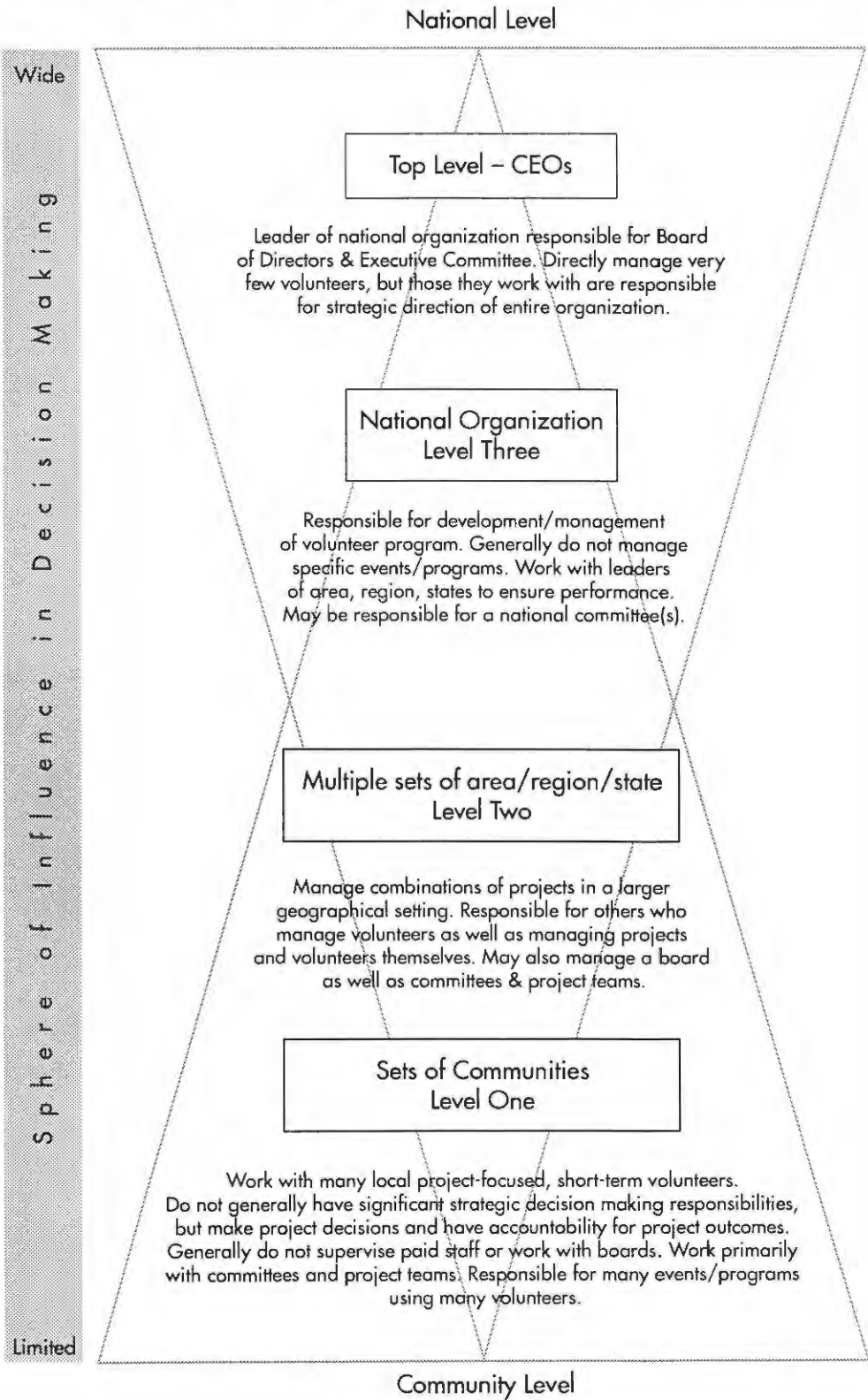
The National Health Council has developed competency models for staff who manage volunteers using the same competency development questions described previously (*see page 54*). Using focus groups from across the United States, we applied this analysis to staff positions in voluntary health agencies that involve management of volunteers. From this, we developed a set of position categories or levels of staff managers. The focus groups then worked through the modeling process to define competencies for their respective levels.

The illustration on page 57 depicts the levels of managers of volunteers in most voluntary health agencies. This graphic includes the types of positions, what they do, their accountability level, their levels of decision making and the types of volunteer positions they manage. The levels have been reviewed by different staff throughout the voluntary health agency environment and are generic enough to cover most staff nationwide.

Critical Competencies: Examples for Various VHA Managerial Levels



Levels of Staff Managers of Volunteers



Competencies for Managers of Volunteers in Voluntary Health Agencies

Initially, let's look at overall organizational competencies. We asked people to rate those three competencies most critical to anyone who works in the voluntary health agency environment and has any type of responsibility for managing volunteers. Not possessing these competencies would definitely stall or stop a person in a career with a voluntary health agency. The following were identified:

Overall Organizational Competencies

- **Administers systems effectively:** is well-organized and pays attention to detail; can always be counted on; remembers commitments; follows through.
- **Maintains composure:** works well under stress and pressure; takes conflict in stride; handles criticism without losing control.
- **Staffs effectively:** can bring together skilled staff and volunteers from either inside or outside the organization; a good judge of people.

Next, we had people rate competencies for the first level of manager, one who is very community-based and project-focused – one who manages many short-term, episodic volunteers in a variety of programs and events.

Critical Competencies: Community Volunteer Manager

- **Accomplishes goals:** works hard; is action-oriented and full of energy for the things that he/she is undertaking; can work with a minimum of planning; sees and takes opportunities when they present themselves.
- **Delegates effectively:** clearly and comfortably delegates both regular and critical tasks and decisions; shares both responsibility and accountability with all members of their teams.
- **Delivers presentations:** is effective in a variety of formal presentation settings: one-on-one, small and large groups, with peers, direct reports and superiors; is effective both inside and outside the organization.

The next rating is for state/regional managers – they have responsibility for multiple projects and generally manage in a larger geographical area. They may also have responsibility for managing other staff.

Critical Competencies: State/Regional Volunteer Manager

- Inspires others to achieve: creates an environment in which people want to do their best; motivates team or project members; assesses each person's driving forces and uses them to get the best out of him/her.
- Sets direction: moves people quickly to what is important; quickly zeros in on the critical few and puts the nonessential issues aside; can quickly sense what will move or stall people in accomplishing a goal.
- Builds effective teams: creates strong morale in the team; shares successes; works toward open dialogue; lets people complete and be responsible for their work; lets others present to senior management; acts as if real success is the success of the whole team; creates a feeling of belonging to the team.

Next, as we approach the top level of the pyramid, the national managers are generally responsible for the development and management of the volunteer program on a large scale. They, for the most part, do not manage specific events or programs. They may be responsible for volunteer leaders of committees or boards.

Critical Competencies: National Volunteer Manager

- Manages changing environments: can effectively cope with change; can shift gears on the fly; can decide and act without having the total picture; isn't upset when things are up in the air.
- Directs projects: accurately scopes out length and difficulty of tasks and projects; sets objectives and goals; breaks down work into the process steps; develops schedules and task/people assignments; anticipates and adjusts for problems and roadblocks; measures performance against goals; evaluates results.
- Works through systems/processes: can develop practices, processes and procedures that allow managing without being there; is comfortable letting projects occur without intervening personally; can make things work through others without being on site; can impact people and results even though decentralized geographically.

Finally, we defined critical competencies of national voluntary health agency CEOs; these were determined at a competency modeling session for CEOs and their board chairs whose organizations are members of the National Health Council.

Critical Competencies: CEOs

- **Makes quality decisions:** makes good, rational decisions, based upon a mixture of analysis, experience, and judgment.
- **Analyzes issues:** learns quickly when confronted with new problems; perpetual and versatile learner; open to change; analyzes both positives and negatives for clues to improvement; open to exploration to find solutions; enjoys the challenge of unfamiliar tasks; quickly grasps the essence and the underlying structure of anything.
- **Solves problems:** solves difficult problems with effective solutions; asks good questions and probes all potential sources for answers; can see underlying or hidden problems and patterns; is excellent at honest analysis; looks beyond the obvious and doesn't stop at the first answers.

● Case In Point

Recently, an organization was restructuring and redefining its business strategies and products. Staff and volunteers were working from traditional position descriptions that stated necessary skills, such as writing grants and delivering education programs. One of the restructuring goals for managers was to identify competencies for each staff. These competencies — “soft skills” — were not currently deemed as critical to the organization or the position, yet they needed to fit into the organization's vision of the future. During this difficult time of change, the Deputy Executive Director told her staff that to develop competencies for their positions concurrent with creating structural changes would mean creating “perpetual alignment” for the organization.

To her, perpetual alignment involves having constant dialogue among staff about individual and organizational competencies — both current and future. To remain perpetually aligned, an organization must develop competencies that are critical but not yet in place; change work processes to match resources and priorities; better utilize technology; balance current individual needs with those of the organization; and determine when there is a misalignment.

It was her concept of perpetual alignment and her belief in — and use of — competencies as a critical success factor that allowed the association to change so that it could continuously explore its systems and maintain the competitive advantage in its particular business environment.

5

VOLUNTEER MANAGEMENT COMPONENTS

This chapter examines the necessary components of an integrated volunteer management system: recruitment, cultivation, critiques and rewards.

■ Jump Start

On any level, prior to recruiting a volunteer or hiring a staff person, answer the following:

- Can I get this task accomplished another way?
 - Would I want to work on a team with myself?
 - What are the appealing things about doing this project?
 - When I have found this person, what will I do to assist them in achieving success?
- *Develop position descriptions that reflect competencies for the job (see page 64).*
 - *Learn a model for interviewing that includes assessment of behaviors that reflect success in needed competencies (see pages 66).*
 - *Consider the key to structuring short-term, episodic volunteer positions (see page 69).*
 - *Design a performance management system for your department or area (see page 70).*

▲ Foundation

One of the key competencies for all staff who manage volunteers is interpersonal skills. In addition, for staff at the local level, relationship building is a top priority competency. The Human Resource Architect Model introduced in Chapter 1 addresses best practices in management within a framework that balances work outcomes with positive relationships with both staff and volunteers.

It is important to understand that you and the unpaid staff, i.e., your volunteers, are part of the same human resources system, and that the connecting nature of all the components in the system is essential. Please review the diagram and related Human Resource Architect Model information (see page 21) before continuing with this chapter.

ALL LEVELS

Learn questions to ask to determine if a person has the desired competencies. Examine your effectiveness in building and managing relationships with volunteers.

COMMUNITY

Learn to recruit not only to task, but for competencies. Examine the key to managing episodic volunteers. Look at informal ways to recognize and reward both paid staff and volunteers.

STATE/REGIONAL

Go beyond defining the position to asking the right questions to get a positive match for both paid staff and volunteer positions.

NATIONAL

Learn about a total model for volunteer management, including development and management tools. Develop a comprehensive performance management system that provides year-round feedback on staff and volunteer performance.



Toolbox

Self-Assessment of Personal Attitudes About Volunteers

This self-assessment focuses on how you manage your relationship with volunteers. Managing volunteers is as much about relationships as it is about an end result or product—that great fund-raising event or successful client program. The art of leadership is about managing those relationships.

Survey developed by Virginia Bianco Mathis, Ph.D., and Cynthia Roman, Ph.D., and adapted by Sharon Koll in 1999.

	NEVER	OCCASIONALLY	FREQUENTLY	MOST OF THE TIME	ALWAYS
1. Volunteers find it easy to talk to me.					
2. I make a point of being friendly to volunteers.					
3. My attitude toward the volunteer is one of partnership.					
4. I avoid behavior that irritates volunteers (put-downs, arguments, and indifference).					
5. I know my organization's services well and keep up with developments in the organization.					
6. I avoid making promises I can't keep.					
7. It is important to me for volunteers to feel good about their contact with me.					
8. I believe it is essential to build good will for the organization.					
9. I look at the angry, disappointed, or frustrated volunteer as a challenge.					
10. I see the volunteer's problem as my own.					
11. I see staff and volunteers as equal partners.					
12. I try to be a cooperative team member, working with volunteers to resolve all situations.					
13. I get job satisfaction from working professionally with volunteers and not talking about, or reacting to, situations personally.					
14. I support and refer to volunteers with favorable comments in order to maintain a workforce that is mutually reinforcing and positively perceived.					

Recruitment

The first step to recruiting paid staff and volunteers is a position description that reflects the competencies needed for the position. From that description flows an interview process based on both skills and behaviors that reflect competency mastery.

With a beginning understanding of competencies (see Chapter 4), you can now add them into position descriptions so that competencies become an integral part of the entire system of paid staff and volunteer management. Below is a sample position description with tasks and competencies. Remember, position descriptions are needed for both staff and volunteers.

The last part of the description includes position specifications required by the Americans with Disabilities Act. Position descriptions are assuming a much higher level of importance due to the Americans with Disabilities Act, passed into law in 1990. The ADA states that employers must give equal treatment to qualified disabled workers who are able to perform the essential functions



Toolbox

Sample Position Description

National Training Director (Staff Position)

Division: Executive

Department: Human Resources

Exempt: Yes

Location: USA

Reports to: Vice President, Human Resources

Employee Signature: _____

Date: _____

Approved by: _____

Date: _____

Summary

Responsible for overall development and implementation of the nationwide training and development program.

Qualifications

Education/Experience

- B.S. or equivalent in Instructional Design or Education.
- Experience with adult learners.
- Four to six years related experience and/or training.
- Association background helpful.

Key Responsibilities

- Design and plan the overall organization training program.
- Ensure a network of regional and community-based trainers.
- Design training component for all national meetings.
- Prepare training budget.
- Supervise a staff of five.
- Staff the Training and Development Committee.

Competencies

- Problem solving: using rigorous logic and methods, able to solve difficult problems with effective solutions.
- Building effective teams: blends people into teams when needed and creates strong morale and spirit in his/her team.
- Presentation skills: can present in a variety of settings both inside and outside the organization.
- Instruction methodology: experienced in distance learning, adult learning and alternate training methods.
- Planning: accurately scopes out length and difficulty of tasks and projects.
- Creativity: comes up with a lot of new and unique ideas.
- Interpersonal savvy: relates well to all kinds of people.

Essential Functions (list)

- Language skills:
- Mathematical ability:
- Reasoning ability:
- Physical demands:
- Work environment:
- Other:

Position Specifications (list)

- Position grade:
- Certifications:
- Licenses:

of a job. The law recognizes a position description as evidence of such functions. Your human resource professionals can assist in filling in this information.

Behavioral Interviewing

Behavioral interviewing is a systematic way to gather and evaluate information about a candidate's past experiences and how he or she might react to future situations. A key assumption is that an applicant's previously demonstrated behavior will most likely be repeated in similar future situations. Behavioral examples given by candidates are from actual events that have occurred in their lives. Questions can be created around key competencies for positions; thus, you can begin to determine whether the candidate demonstrates your desired behaviors for given work situations. All candidates are asked the same questions, which are open-ended in nature, in order to gain more information from a person (rather than the standard yes or no). Sometimes, an applicant will fail to give a specific behavioral example, at which point the interviewer must ask another probing question.

Interviewing to determine desired knowledge, skills and aptitude can be done via phone screening. However, due to lack of face-to-face interaction, phone screening can cause problems when you are attempting to probe further into past experiences. Phone interviews with video capability are gaining popularity due to their cost effectiveness with geographically dispersed candidates and employers. In-depth personal interviews are essential in any final stage of hiring.

Following are samples of competencies and possible related behavioral interview questions and follow-up probing questions. These behavioral interview questions are open-ended and lead to more in-depth answers that assist in candidate analysis.



Toolbox

Behavioral Interviewing: Questions Based on Competencies

Accomplishes goals: works hard; is action-oriented and full of energy for the things that he/she sees as challenging; can work with a minimum of planning; sees and takes opportunities when they present themselves.

Question: Have you ever started up a project with no direction? Describe it.

Probe: How did you come up with the approach for getting it going in the first place?

Manages changing environments: can effectively cope with change; can shift gears on the fly; can decide and act without having the total picture; isn't upset when things are up in the air.

Question: Think about a time at work when everything was up in the air — changes occurring at a rapid pace. Explain that to me and tell me what you did to handle it.

Probe: Would you have done it the same way if you had had more structure or tighter deadlines?

Makes quality decisions: makes good, rational decisions based upon a mixture of analysis, experience and judgement.

Question: Give me an example and lead me through your decision-making process on a project or some form of process improvement.

Probe: Do tight deadlines affect your approach? How?

Delegates effectively: clearly and comfortably delegates both regular and critical tasks and decisions; shares both responsibility and accountability with all members of their teams.

Question: Describe how you work with team members to take on projects. How do you define each person's role/tasks?

Probe: Why does your method work?

Analyzes issues: learns quickly when confronted with new problems; perpetual and versatile learner; open to change; analyzes both positives and negatives for clues to improvement; open to exploration to find solutions; enjoys the challenge of unfamiliar tasks; quickly grasps the essence and the underlying structure of anything.

Question: Tell me about a time when you had to learn a new process quickly.

Probe: Have you always approached things that way?

Inspires others to achieve: creates an environment in which people want to do their best; can motivate team or project members; able to assess each person's driving force and use it to get the best out of him/her.

Question: What motivates you to do your best?

Probe: How do you get others to do the same?

Directs projects: accurately scopes out length and difficulty of tasks and projects; sets objectives and goals; breaks down work into the process steps; develops schedules and task/people assignments; anticipates and adjusts for problems and roadblocks; measures performance against goals; evaluates results.

Question: Think of a complex project you worked on that had a strict deadline. What steps did you take to make sure you delivered?

Probe: Why do you think that worked for you?

Delivers presentations: is effective in a variety of formal and informal presentation settings, including one-on-one, small and large groups, peers, direct reports, and superiors; is effective both inside and outside the organization.

Question: What is the difference in your approach to small-versus large-group presentations?

Probe: How do you determine what approach to take when presenting to various groups?

Sets direction: moves people quickly to what is important; quickly zeroes in on the few critical tasks and puts the nonessential issues aside; can quickly sense what will move or stall people in accomplishing a goal.

Question: When many people need you at the same time, what do you do?

Probe: Give some examples of how this has worked for you.

Solves problems: solves difficult problems with effective solutions; asks good questions and probes all fruitful sources for answers; can see underlying or hidden problems and patterns; is excellent at honest analysis; looks beyond the obvious and doesn't stop at the first answers.

Question: Tell me about a problem that you encountered that was not what it appeared to be at first. How did you solve this problem? What was the outcome?

Probe: Would you change your approach to the same problem if it happened today?

Works through systems/processes: can develop practices, processes and procedures that allow managing without being there; is comfortable letting projects occur without intervening personally; can make things work through others without being on site; can impact people and results even though decentralized geographically.

Question: Give an example of a time when you had to manage people reporting to you at distant sites. What processes did you put in place to manage them effectively?

Probe: How comfortable were you with how things were going even though you weren't there yourself?

● Case In Point

We recently conducted a search for an organization that was looking for a director of human resources. We did the prescreening for background skills and knowledge and an initial determination of the organizational fit using defined organizational competencies. The person hired would need to have an immediate meld with the senior management team, for which team competencies had already been defined. The final candidates needed to match with these critical team competencies. The team was presented with three very solid candidates, all of whom possessed the essential skills for the position. When the management team conducted interviews with each of the three utilizing pre-established criteria for behaviors, it was an easy process to hone in on who was the best match for this position. Separate interviews had isolated these three people as being most skilled in human resource skills, but when they went through a behavioral interview, the right match became evident.

Cultivation and Critique

Assume you have hired a great match to fill a position at your organization. What can you now do to ensure success? Many times, failure in both staff and volunteer management happens in the area of communication about expectations. What measurement programs do you have that speak to the growth and evaluation of employees and volunteers? What systems do you have to help understand current abilities in necessary competencies, and how can staff build on them?

It is important to view this area as involving two distinct processes. Cultivation is an ongoing process. It begins with the orientation of each employee and volunteer, and continues with on-the-job learning and professional development. Critique is a cyclical process. The employee/volunteer and the supervisor periodically discuss and review progress on defined objectives.

As avid proponents of an ongoing system of performance management, we advise associations to not only utilize a behavioral interviewing system, but to have an internal process of performance management that includes:

- periodic discussions *separate from appraisal* about how things are going;
- an ongoing development plan; and
- a yearly appraisal that is well thought out and measurable.

At this point, many people usually roll their eyes and say, “we don’t have time.” Yet, statistics on the reasons and costs of turnover point to the lack of management guidance and mentoring on a regular basis. You choose what you have time for - turnover, which has a high cost, or a high performance work system, which includes all the elements of the human resource function.

Voluntary health agencies and other nonprofit organizations have long recognized the importance of cultivating donors and knowing their donors' needs, wants and interests. It has become just as important to cultivate and then get to know both paid staff and volunteers in the same way. If their needs and interests are not met, they may simply choose to go elsewhere.

Cultivation

So now you have brought this person on board. The easy part is done. Some years ago a consulting colleague, John Scherer, shared his story of the “mating dance of the Watusi bird.” He related that, as this bird is first trying to find its mate, it fluffs up, dances and puts its best feathers forward. So it is in the first stages of all relationships, work or social. We see the relationship from the viewpoint of “life is great, I am good, and I want this relationship to work.”

Then it happens: Once on board, we tend to lose our perspective of making that relationship the focal point. This happens time and again in the workplace, when product becomes the focal point, and the relationship is secondary. However, research studies have shown that interpersonal relationships are a critical component of how work gets done. Today we have direct evidence that people bounce from one organization to another based on what fuels them — usually respect and recognition for what they bring to a particular role. One recent study by WorkforceOnline found that people do not leave companies, they leave managers (see Bibliography).

Let's piece it all together. As a manager of volunteers, you more often than not will be managing short-term, episodic volunteers. You have only a short time to cultivate the relationship. However, if the experience is a good one, they will recommit to another short-term episodic experience. What are you doing to bring them up to speed on their role and expectations? Orientation? Event specifics? How will they recognize success? Do you really know who they are and what makes them happy?

Cultivating a Short-Term, Project-Focused Volunteer Workforce

No one goes for the gold watch anymore. Today, remaining at the same organization for a long time is no longer valued as it once was. Employees and volunteers alike are stepping back and asking, “What’s in it for me?” People have made a decision to take a more proactive approach in looking at their professional and personal needs. They want to develop skills and achieve things that have meaning to themselves or their community, while balancing other interests. Even those volunteers who come to a health agency with a strong personal commitment to the mission have less time to give, and have a need to see significant immediate successes. People are not signing on for the long term. Today, it is important to define work based on *performance* rather than *time*.

This may mean you need fewer volunteers involved in governing the organization, and more volunteers who perform specific tasks. The traditional relationship wherein volunteers fulfill the same role for years no longer works. Volunteer jobs are no longer a one-size-fits-all agreement. Will short-term volunteers become mission driven? Perhaps. But it must be done one step at a time. The key to cultivating both paid staff and volunteers is creating ways to translate their personal needs into meaningful performance opportunities.

● Case In Point

A successful group of accountants who managed firms in the Big Six had worked long and hard to reach this pinnacle. But they were frustrated - they wanted to know why their young CPAs were not staying, but opting to job-hop and try other firms. When the leadership was asked what they did to cultivate these young professionals, they said, “Well, we send them for training, and pay them quite well.” When asked about how these young employees could aspire to move up the ladder, they exclaimed, “It took us 20 years to make full partner in this firm, and we think they should pay the same dues!”

That is the crux of the issue: The leadership did not stay in tune with what it means to understand and cultivate different types of people. What satisfied the leadership did not translate to the younger entry-level accountants.



Toolbox

Performance Management System Guidelines

Following is a guide for building a performance management system for both staff and volunteers. This guide will assist you in understanding an entire process of performance management, as well as in knowing how to discuss each component with staff. Please note that we use the term performance “management” as opposed to appraisal. Management occurs all year round, while appraisal is one component of the system. As well, the term “staff” here refers to both paid staff and volunteers.

Performance management is a team effort between the supervisor and his/her direct reports, wherein they discuss and agree upon what is to be accomplished and how all types of performance will be measured. This process is a means of connecting together the goals of the organization and its staff. All staff should clearly understand what is expected of them and receive feedback on a regular basis regarding those expectations. They should also receive meaningful, well-planned developmental opportunities, which fulfill their personal growth needs and maximize their contribution to their organization.

Supervisor Responsibilities

Regular communication between the supervisor and his/her direct reports concerning the staff person's efforts and results will eliminate any “surprises” during the final performance interview. Any conversation becomes an ineffective tool when there is a difference between the supervisor and the direct report's perception of actual performance results. It is the supervisor's responsibility to create a climate of open communication regarding job performance objectives, performance factors and overall expectations.

The System

This comprehensive system is designed for the following:

- to provide staff with feedback on their performance;
- to document staff job accomplishments;
- to create development opportunities for staff growth;
- to establish an appropriate level of compensation that is based on staff performance.

Suggestions for Completing Performance Appraisals

- Discuss results, not the person. If there is a gap between objectives and what has been accomplished, deal with the gap. By focusing on the desired outcomes, individuals will usually not feel attacked themselves and will react less defensively.
- Be specific. Identify the performance gap that may exist and/or superior accomplishments that have been demonstrated. Cite data. Provide examples. Specific feedback allows both the supervisor and the staff person to make sure they understand each other.
- Determine causes. Consideration of causes makes the entire process much more of a problem-solving

process. It permits exploring the need for action by both parties.

- Make it a two-way process. Neither supervisor nor staff person should dominate the discussion. The appropriate use of questions and listening techniques can encourage two-way communication.
- Complete an action plan for future work and personal development.

Feedback Tips

- Each individual has his/her own way of absorbing information, with different hot buttons. Be sensitive to individual and different cultural interpretations of being evaluated.
- Try to start from the other person's frame of reference. Remember that each of us has a need to be appreciated.
- Listen attentively — show that you really care about this conversation.
- Ask questions. Feedback involves further learning on your part.
- Be behavior specific.
- Plan on follow-up discussions.
- Discuss development plans — what are the growth opportunities?
- Revisit the competencies for the position. Do they still fit?
- Review the organization's strategic plan so that each staff person understands and shares in the ownership of this directional roadmap.



Toolbox

A Sample Performance Management System

From Grassroots to National *advocates an integrated human resources management system for both paid staff and volunteers. The following sample performance management system is an important human resources tool that can be used to cultivate and critique both volunteers and paid staff based on the competencies they use on the job and on the outcomes of the work performed.*

Organization Philosophy: [Your Organization Name Here] recognizes that a comprehensive system of performance management is essential for four major objectives:

- To provide employees with feedback on their performance;
- To document employees' job accomplishments;
- To create development opportunities for employee growth; and
- To establish an appropriate level of compensation that is based on employee performance.

[Your Organization Name Here] performance management program is an ongoing process that consists of planning, periodic reviews coupled with development efforts and performance evaluation.

Instructions

[Your Organization Name Here] performance management format was developed to clearly state, and provide evaluation of, those critical quantitative and qualitative competencies that each employee must demonstrate for the organization to succeed. Each of these competencies was selected and defined based on our business goals, mission and input from staff.

The system consists of five sections:

- Section I: Performance Objectives (quantitative goals)
The bottom-line factors of performance, such as dollars raised, people reached and volunteers recruited.
- Section II: Performance Factors (qualitative behaviors)
The desired competencies critical to the position.
- Section III: Quarterly Checkup
Just as you do for your car, this is the time to make sure all parties are talking about expected performance and making adjustments to ensure success.
- Section IV: Overall Performance
At year's end, the summation of all the above.
- Section V: Goals for the Coming Year.

Rewards and Recognition

"Compensation is a right; recognition a gift."

— Rosabeth Moss Kantor, Author and Management Consultant

Aside from pay for performance, there are other formal methods that can be used to reward people for their work. These include a coaching/mentoring program and a variety of personal development opportunities. In addition, there are myriad informal rewards that can be applied equally to volunteers and paid staff. Remember, while recognizing volunteers for their efforts, it is equally important to recognize paid staff for their effective management of volunteers.

Here are some ideas for inexpensive ways to reward staff:

- Offer a self-development opportunity
- Implement informal day-to-day acknowledgements
- Ask for an idea or opinion, and then follow up on it
- Provide a special parking spot for a week
- Take a group out to a special meal and ask for input
- Pick someone up for work in a special van, taxi, or limousine
- Post photos of award winners in the lobby
- Provide free passes to health clubs
- Throw a surprise birthday party
- Give a reward related to the person's hobby
- Award savings bonds for their children
- Hand out specialty items such as shirts, hats, cups, mugs, bumper stickers
- Permit flex time for a week
- Donate to a charity in their name
- Pay a local youth group to wash cars for all staff
- Place an article with accompanying photo in the organization newsletter
- Post name on lobby bulletin board
- Deliver flowers or balloons at home after a special project
- Have a treasure chest of gifts to pick from
- Pop in during a project team meeting and thank them for their efforts
- Send handwritten notes of thanks or praise
- Arrange to have a billboard donated and list names for thanks for a month

We are sure you have others to add. The key is to DO IT.



INCLUSIVE VOLUNTEER MANAGEMENT SYSTEMS

This chapter explores the necessary elements for building inclusive volunteer management systems.

■ Jump Start

- Study the generic steps to creating a diversity initiative (*see page 78*).
- Examine the barriers in your organization to creating a more inclusive program (*see page 78*).
- Learn about the organizational policies, procedures and tools that can help to implement the program (*see page 79*).
- Assess how staff and volunteers feel about the inclusivity of your organization's volunteer program (*see page 80*).
- Create your own list of the staff competencies you want to develop through diversity training (*see page 81*).
- Examine ways to create a more inclusive volunteer program (*see page 82*).
- Design a strategy for creating partnerships in the community (*see pages 83*).

We start this chapter with a flashing caution light. This chapter is not intended as a primer or a comprehensive manual on diversity. There are many thorough resources available on that topic (*see Bibliography, p. 115*). This chapter looks at what has been learned in the field of volunteerism, particularly in voluntary health agencies, regarding what can lead to successful inclusive volunteer management systems. It is a start to preparing staff to make their volunteer programs more inclusive. It is our hope and recommendation that you will use this information as a starting point to help you understand what you need to learn to create and/or improve an inclusivity initiative.

ALL LEVELS

Understand the key elements and components of a successful inclusivity initiative.

COMMUNITY

Implement and build a local organizational diversity initiative among paid and volunteer staff. Create and build local partnerships with organizations that represent the volunteer populations you have targeted.

STATE/REGIONAL

Develop tools that can support and roll out national inclusivity initiatives on regional and local levels.

NATIONAL

Learn to create a national inclusivity initiative; develop the expertise and sponsorship necessary to create a national inclusivity initiative. Gain an understanding of the organizational tools, policies and procedures needed to support a large-scale inclusivity initiative.

▲ Foundation

From Grassroots to National focuses on preparing paid and volunteer staff to successfully manage volunteers. One vital volunteer management function is creating inclusive volunteer systems. The composition of paid and volunteer staff is changing, both in general and specifically within voluntary health agencies. Overall, demographics in the United States are shifting dramatically. These include large, new immigrant populations; a growing elderly population; the workforce melding of several, distinctly different generations; and changes in the size and influence of several ethnic and racial groups.

In addition, within voluntary health agencies there is an increasing blend of two diverse volunteer groups: traditional volunteers who represent the client constituency, and newer, distinctly skilled volunteers who may not have emotional ties to the specific health issue. All of these shifts demand an increased sensitivity to diversity in values, communication and paid and volunteer staff's needs and motivations.

How do diversity issues translate to the day-to-day business of volunteer management systems? They could mean that three volunteers on one work team — one who is 22 years old, one who is 46 and one who is 75 — are in escalating conflict due to contradictory work values and styles. They could mean that a male volunteer manager who has excellent intentions unknowingly offends female volunteers. They could show themselves in the fact that an organization is trying to reach a constituency whose majority belongs to one ethnic group, while 95% of that organization's volunteers and paid staff are from another ethnic group. Or they could mean that a volunteer program that desperately needs volunteers is overlooking a large, physically challenged population that could provide highly skilled volunteers to their organization.

In addition to the ethical and moral reasons for having inclusive volunteer management systems, there is a strong business case. Volunteer management systems that are inclusive of all the populations within a community add value to the organization. They can:

- increase the organization's reach and recognition in the community;
- create valuable community relations;
- improve paid staff and volunteer morale by creating an atmosphere in which paid staff and volunteers feel valued;
- minimize conflicts and miscommunications between paid staff and volunteers due to offensive comments and conduct;
- expand the pool of both paid staff and volunteers by attracting and retaining the best;
- provide a variety of perspectives on solving a problem; and
- increase the organization's competitive advantage by leveraging the inevitable demographic changes within the workforce.

Diversity and Inclusivity

Diversity is the range of differences in biology and cultures found among all people. Inclusivity is the act of including these various diverse groups together in some activity or group.

Diversity includes:

- age;
- ethnicity;
- gender;
- physical ability;
- mental ability;
- race;
- sexual orientation;
- religion;
- geographic origin and location;
- income; and
- familial status (including marital and parental).

People have both biological and cultural differences. We look different. Biology determines our sex, the color of our skin, hair and eyes. And it can limit us physically or mentally when we have a disability. Culture is how we are raised to view and practice life. It tells us what to believe and value, and how to interpret various situations. There are several dimensions of culture.

These include ways of thinking and acting around the broad areas of:

- Notions of individualism;
- Communication;
- Food and eating habits;
- The use of time;
- Relationships;
- Values and norms;
- Beliefs and attitudes;
- Thinking and learning;
- Dress and physical appearance; and
- Work styles and processes.

Each of these dimensions can be subtle, yet they are also complex. For example, within communication there is:

- Language;
- How a person listens;
- The way the words are presented;
- The culture of the language;
- How conversations overlap;
- The use of silence;
- Volume; and
- The non-verbal aspects of communication that include body language, touch and distance.

Think of a time you had a problem communicating with someone who was from a different culture than you — a different age, ethnic group, gender or racial group. Could the conflict be traced to the two of you having different interpretations of what was said or how it was said (or not said)?

Once you start to observe the myriad dimensions among cultures, you can begin to see two important things:

- There is a wide range in perceptions between people of different ages, ethnic backgrounds, gender, physical ability, mental ability, race and sexual orientation; and
- Due to diverse cultural perceptions, you can never assume you understand the meaning of another person's actions or behaviors.

What does having an inclusive volunteer program mean to your organization? With inclusion, paid staff and volunteers could reflect the demographics of the population the organization serves, or the diversity of the larger community in which the organization operates. Each organization must carefully consider what inclusiveness means for it and how best to implement an inclusive volunteer program.

The Key to Creating an Inclusive Volunteer Program

Creating an inclusive volunteer program demands a long-term leadership commitment and willingness — to share power, to feel uncomfortable as you work in new situations, and to challenge your core beliefs about people. It's a tall order. And it's worth it. But it will only happen if you have the right ingredients. The most important ingredient is leadership commitment to creating and

maintaining an inclusive organization. You cannot have a successful inclusive volunteer management system without having an inclusive organization.

Why? When inclusivity truly exists among paid staff, the organization is making a powerful statement: “We want and value people from diverse groups and we will structure our organization to support that diversity.” If the organization does not currently embrace diversity among paid staff, how can it honestly embrace diversity among its volunteers? The organizational culture may not welcome the new population and sooner or later (usually sooner), those volunteers will leave. People know when they are in an environment that values them. They know when the organization with which they are volunteering considers their values and needs and when it doesn’t.

You first must walk the talk internally before you begin an inclusive volunteer promotion campaign. For state, regional, and national level staff, this means there is a commitment from national leadership to build a nationwide inclusivity program. For local level staff, can you have an effective local inclusivity initiative if the national umbrella organization does not make a commitment to diversity? We think so, if the local office has the power to create a local inclusivity change among paid staff and the volunteer pool.

● Case In Point

One program director of a voluntary health agency tells the story of going to a national nonprofit that addressed African American issues with the intent of asking to create a volunteer recruitment initiative with that organization. The CEO of the nonprofit asked the following questions in their meeting:

- How many African Americans are on your board of directors?
- How many African Americans are on your paid staff and what level positions do they hold?
- How many African Americans hold field leadership positions in your organization?
- What is your organization’s strategy to include African Americans?

The voluntary health agency staff person could truthfully answer only “none” or “hardly any” to these questions. The CEO said, “Come back and see me when your organization is ready to make a true commitment to diversity.” This CEO was not willing to involve his constituents in partnership with an organization that did not truly value African Americans.

Steps to Creating an Inclusive Organization

Below is a generic model that highlights the major steps to creating both a more inclusive organization and an inclusive volunteer management system. Please use this as a guide to shape your thinking, knowing that there are many excellent and thorough resources listed in the Bibliography.

1. Prepare for the Change

- Define what inclusivity means to your organization's mission, i.e., create the business case.
- Create a vision of what it will look like to have an inclusive organization.
- Identify who in leadership will sponsor (promote) this change - don't go any further if you can't get sponsorship.
- With your sponsor's support, get a concrete commitment from leadership on what they will do to make this change a success (this includes actions, money, time and other resources). Again, if you don't get this, you can't successfully make this change.
- Assess the current organizational environment for diversity.
- Analyze barriers to this change.
- Set up teams to design and implement the change.
- Create a change plan. This will include identifying the infrastructure, policies, and tools that will be needed to implement and reinforce this change.
- Design those tools and policies.

2. Carry Out the Change

- Communicate the change to all staff.
- Train people in new skills and knowledge.
- Monitor implementation and progress.
- Celebrate and communicate success.

The next several pages provide tools to help you with implementing the above steps.

Organizational Process and Structures for Inclusive Volunteer Systems

Much that we have said about implementing any type of change applies to creating inclusive organizations. There must be accountability to ensure that the change will succeed. With accountability comes measurable goals and clear roles for staff. Following are recommended

structures and processes to develop and nurture diversity within an organization.

- A clear policy that outlines desired and unacceptable behaviors in the workplace.
- A recruitment and retention strategy that identifies and targets specific populations based on their needs and values.
- Measurable goals for an inclusive workplace, and data collection methods for those goals.
- “Diversity management,” defined as a critical competency for all staff who manage both paid staff and volunteers.
- Performance reviews that measure diversity management competencies.
- Training in identified skills and behaviors.
- Workplace tools to reinforce desired behaviors. These could include:
 - Checklists on giving performance feedback in a culturally sensitive manner;
 - Cross-cultural team building exercises; and
 - Checklists on ways to set up inclusive meetings and to assess their effectiveness.



Toolbox

Assessing Barriers

Which of the following barriers exist in your organization?

1. There is no commitment from leadership for designing a more inclusive organization.
2. The cost — financial and other resources — of implementing a diversity program is too high.
3. There is no system for accountability to enforce this change.
4. This would require changing human resource systems, and I can't do that.
5. Diversity is not seen as a priority issue by leadership.
6. Volunteers don't want to change the makeup of the current workforce.
7. There is a fear among staff or leadership that I would be bringing in volunteers who are under-skilled.
8. There is a perception that diversity programs are reverse discrimination.
9. There is a perception that there already has been a lot of progress in this area.
10. I would like to create a more diverse program but I don't know how.

Which of the above barriers can you truly change?

Numbers 1-5 are organizational barriers that can be addressed with a change in management strategy that has the support of senior leadership (see *Help I Don't Even Have a Sponsor*, page 39, and *The Voluntary Health Agency Change Management Process*, pages 45-46).

Barriers 6-9 are attitudinal issues that can be addressed through training and communication. However, because attitudes around diversity can be deep and controversial, you must first have the strategy and sponsorship to make changes in the organization that will address the attitudinal issues.

Barrier 10 is the easiest one to address. There are excellent training programs, information and tools available on this topic. And in every community there is a wealth of diverse populations you can learn from. Once you decide you want to follow this path, you will find the information you need.



Toolbox

A Staff Diversity Assessment Tool

To assess the current organizational climate for a diversity initiative, you may conduct a cultural assessment of peoples' perceptions of the environment for inclusivity. Below is the start of a generic cultural diversity assessment. Adapt this to the questions you feel are important in your organization. One important word about assessments: do not conduct an organizational assessment unless you are willing and empowered to follow through on the issues that are raised. Asking for people's opinions and then not taking actions on those issues can cause serious damage within organizations.

Distribute this assessment to a representative sampling of paid and volunteer staff. Ask them to fill it out anonymously.

I am a:

- Leadership volunteer.
- Program/fund-raising-related volunteer.
- Paid staff.

Please check those items that you think are true within your organization.

- Volunteers are accepted regardless of their lifestyle.
- All segments of the population are represented in the volunteers and paid staff.
- Jokes and slurs about any group are not tolerated.
- There are no exclusive cliques between groups.
- Volunteers feel valued.
- Paid staff feel valued.
- There are warm, friendly groups of people from diverse backgrounds.
- Volunteers of all ages, ethnic backgrounds, gender, physical/mental ability, race and sexual orientation are respected.
- Paid staff and volunteers are sensitive to different cultures' holidays, customs, dress, and food selections.
- No one group dominates meetings.
- Volunteers in this organization are a diverse group of people that match the population we are trying to serve.
- Recruitment and training materials reflect variety in age, gender, race, ethnic background, mental ability and physical ability.
- Paid staff and volunteers are trained to respect and acknowledge people's differences.

Tally the results and use the answers to help you examine areas to address in building an inclusive organization.

Diversity Training

Cultural attitudes lie close to people's values and beliefs. Thus, to create inclusive workplaces, paid staff must examine their own behaviors and learn to work with people who are different from them. This is usually done with diversity training, and then reinforced through organizational processes and structures. The first step in designing this training is to link it to the organization's mission and goals. What is the business reason for this training? Remember that the issues arising from an awareness assessment may also point to potential problem areas and, thus, business issues that need to be addressed. In a 1994 Conference Board study of leading-edge companies, diversity trainers identified the following as important outcomes for diversity training.

Increase in Awareness

- Awareness of self, cultural differences, different communication styles, personal biases
- Greater sensitivity to differences
- Understanding that diverse means different but not wrong
- Understanding of individual perceptions

Development of Skills

- Ability to change personal individual behavior
- Ability to practice objectivity
- Ability to analyze unique situations
- Ability to listen to others
- Ability to communicate with others who are different
- Ability to build teams
- Ability to resolve conflict constructively
- Ability to recognize situations of harassment or discrimination or prejudice

Increase in Knowledge

- Knowledge of Equal Employment Opportunity/Affirmative Action laws
- Understanding of dimensions of individuals, groups, and organizations
- Understanding of acceptable and unacceptable behavior within the workplace
- Understanding of demographics
- Understanding of the impact of diversity on business
- Understanding of clients and customers
- Understanding of work/life and alternative work options

Development of Personal Attributes

- Inclusive
- Open
- Empathetic
- Willing to develop and continue the diversity dialogue

We urge anyone who wants to design or deliver diversity training to study the current knowledge in this field. An excellent resource to start this learning is *The Managing Diversity Survival Guide* by Lee Gardenshwartz and Anita Rowe (see Bibliography).

Making your Volunteer Management System More Inclusive

Once your organization is on its way to being more inclusive, then you can move to create an inclusive volunteer management strategy using the following steps:

1. Prepare for the Change
2. Build Partnerships
3. Implement a Targeted Recruitment Plan

Prepare for the Change

- Based on your organization's mission and needs, decide which volunteer populations you want to actively recruit.
- Create a team that includes members of the targeted populations. Have that team review the volunteer management system and make recommendations on how the system can be more open to all populations.
- Think about all the possible organizations that represent the particular populations you want to target. To find the names of groups, look for organizations that would have related key words in your local telephone book or in other local print, online or informal resource lists.
- List what your organization can offer these potential partners and what you expect to get from them. Use this list to help you target who you will work with and how to approach them.
- Learn about the targeted communities. Check out your own perceptions about this group to see if what you assume about this group is true.
- Get a commitment from leadership on the resources necessary to implement the above items.

Build Partnerships

- Be patient when dealing with community groups. It may take a long time before people believe you and trust your motives.
- Determine what the partners want out of the partnership.
- During the first meeting with the potential partners, talk about how you can work together toward mutual goals.
- Express expectations clearly and realistically during the first meeting. Put in writing what each partner expects before any agreement is complete.
- Develop cooperative programs that will help both groups achieve greater visibility with decision makers, the media and the community.
- Design activities that reflect both your potential partner's interests and what you want to accomplish. Be flexible and provide options.
- Develop strategies to enhance both partners' skill levels by sharing information and organizing joint training programs.
- Be honest with people and follow through on your commitments.

Implement a Targeted Recruitment Plan

- Refer to your activity using words that relate to that community's definition and history of community involvement. While you may see an activity you define as volunteering, the word, "volunteer," may have a negative connotation for others. Find out what is important to the group you are working with and use their words.
- Highlight the benefits of volunteering.
- Use publications about volunteer opportunities in a format — both language and style — that relates to the intended readers.
- Highlight flexible hours and the fact that some volunteer tasks can be accomplished at home.
- Include messages, photos and illustrations that reflect variety in age, sex, ethnicity and race.
- Hold community forums about your organization and the volunteer opportunities that you have.
- Encourage families to participate in volunteer activities.
- Locate volunteer activities in communities where specific populations live.

The Perils of Being a Change Agent

To reach out to new populations, you must build relationships based on trust. While you are building relationships on behalf of your organization, the relationships are with you personally. Your reputation and credibility are at stake with these relationships. You need to know what

organizational commitment means to this project in terms of money, time, resources and visible leadership support. If the organization does not support this initiative, you may find yourself unable to follow through on your commitments. This can cause serious damage to your reputation and to the reputation of the organization. Thus, do not attempt an inclusivity initiative unless you are willing and empowered to follow through on it.

7

ACCOUNTABILITY

This chapter examines accountability and the types of evaluative tools that are necessary for effective program and volunteer management.

■ Jump Start

At what level does volunteer management training need to be evaluated in your organization (see page 89)?

When do you need to assess the following (see page 92)?

- Volunteer satisfaction
- Customer/client satisfaction
- Paid staff and volunteer performance assessments
- Outcome measurement
- Process improvement

Consider the differences between outcome, output, input and impact (see pages 87-88).

▲ Foundation

Ask people within your organization what accountability in volunteer programs means to them and you'll get many answers.

<i>For...</i>	<i>Accountability may mean...</i>
<i>Members and contributors</i>	<i>The organization meeting its stated mission.</i>
<i>The CEO</i>	<i>The cost and impact of the volunteer program in meeting the mission of the organization.</i>
<i>Regional and national level staff</i>	<i>Justifying the volunteer program and its costs to a variety of stakeholders (including national leadership and funders).</i>
<i>Local staff who supervise volunteers</i>	<i>Volunteers are doing what they are supposed to. Creating a volunteer management environment where volunteers are satisfied and want to continue volunteering for the organization.</i>
<i>Volunteers</i>	<i>Doing what they have committed to do. It may also mean how accountable the organization is to them.</i>

ALL LEVELS

Examine accountability and the types of evaluative tools that are necessary for effective program and volunteer system management.

COMMUNITY

Examine whether volunteers are accomplishing their work and whether they are satisfied with the work they are doing. Learn ways to improve the processes related to volunteer management.

STATE/REGIONAL

Learn program outcome measures that show the effectiveness of regional and local programs. Use these outcome measures to promote the value of the program to external and internal stakeholders.

NATIONAL

Use process improvement tools to create more efficient programs that can be rolled out to regional and local levels. Tie program outcomes to personal performance indicators to create an integrated performance management system.

Accountability means being held responsible. Evaluation is the means by which a person shows he/she has been accountable. What evaluative measures do staff need to use to prove that they are meeting their responsibilities to leadership, their job, volunteers, customers/clients and external customers? What data do they need to collect and how should they use that data?

Evaluation Methods

Will the Best of Intentions Be Enough?, the national study of volunteerism in voluntary health agencies, asked the participants what they felt was the most important data they should collect to evaluate their volunteer management systems.

Their answers included:

- Paid staff and volunteer attitudes, behaviors and trends;
- Volunteer satisfaction;
- Basic volunteer demographics (e.g., education level, type of service, location/setting of service);
- Volunteer retention and attrition;
- Volunteer performance data (number of volunteers, number of hours per volunteer, amount of funds raised by volunteers, total volunteer hours, hours by activity, dollar value of hours) ;
- Correlation between satisfaction and retention;
- Reasons why people volunteer;
- Volunteer leadership tracks within voluntary health agencies (including career ladders, promotions, involvement in planning, increasing levels of responsibility);
- Volunteer management and skills training: frequency, duration and participant feedback on training;
- Individual volunteer performance;
- Matching of volunteer interests with assignments;
- Demographic profile of diversity of volunteers; and
- Patient/client satisfaction with the volunteer program/activity.

For a rating of software programs that collect much of this type of data, see page 101.

All of this appears to be important data to collect and analyze. However, as with any data and evaluation methods, the question comes down to why we need this information and what we are going to do with it. Specifically, how will this data help you to improve the strategic direction of your organization?

As a person who manages volunteers, what do you need to evaluate, and what are the data you need for that evaluation? You are accountable for measuring the outcomes of the goals and objectives related to your work. And you are accountable for those things on which your work will

be evaluated. In other words, you need to be able to show the results of your work. You will want to link those results to the volunteer management system in your organization. You will want to know if your volunteers and customers are satisfied with the programs being provided. And you will want to know how to do things better, for less money and more efficiently.

The most common types of evaluative measures used by staff who manage volunteers fall into five broad categories.

- Volunteer satisfaction;
- Customer/client satisfaction;
- Paid staff and volunteer performance assessments;
- Outcome measurement; and
- Process improvement.

The Volunteer Management Systems Evaluation Chart (*see page 91*) explains these measures.

Assessment Terms

The following definitions, adapted from The Points of Light Foundation, explain terms commonly used in evaluating volunteer systems.

Goal:

- A statement of purpose; an end that one strives to achieve.
- Embodies consensus on underlying values.

Objective:

- Specific statement describing what will be accomplished, by when, for whom and how success will be measured.

Input:

- Resources, including money, paid staff and volunteer time, materials and facilities.

Output:

- The quantitative evidence of the activity component of the program. Examples could be number of meetings attended, number of youth recruited, number of volunteer hours.

Outcome:

- An assessment of changes in conditions, people, policies that are linked to the goals/objectives of the program.
- Answers the questions: What is different? To what extent did we accomplish our goals? What are the unintended results of this program? To what extent do the outcomes measure up to our expectations or benchmarks/standards?
- Outcomes are associated with program services and activities; an outcome measure is a measure of an effect of a service or fund-raising activity.
- Differ fundamentally from outputs, which are simply counts of clients served or other units of service, without information on service effectiveness.

Impact:

- Longer-term, community-based result of the program.
- Quality of life indicators, including economic, educational, health, family and neighborhood indicators, inform the assessment of impact.
- Determining impact requires comparing the conditions of a target group that has been involved in the program or fund-raising activity with a group that has not.

Indicator:

- A specific kind of data to be used in tracking progress toward achieving objectives.
- A specific variable or gauge, measured over time and determined to indicate success in the assessment process.

Benchmark/Standard:

- Something that serves as a standard by which conditions, activities and/or competencies may be measured or judged.

Training Evaluation

Training may be evaluated at several different levels, depending on what you need to evaluate. Following are standard training evaluation levels. (Adapted from J. Phillips' "Return on Investment – Beyond the Four Levels;" Academy of HRD, 1995 Conference Proceedings.) Detailed explanations and tools for each level can be found in the same source.

- Level 1: Reaction and Planned Action**
Measures participant's reaction to the planned program and outlines specific plans for implementation.
 - Level 2: Learning**
Measures skills, knowledge or attitude changes.
 - Level 3: Job Applications**
Measures change in behavior on the job and specific applications resulting from the training.
 - Level 4: Business Results**
Measures business impact of the program.
 - Level 5: Return on Investment**
Measures the monetary value of the results and costs for the program.
-

System Accountability

The Paradigm study states, and best practices support, that in the most effective volunteer programs, the volunteer management function is integrated throughout the organization. But when everyone is involved, who is held accountable? Where are the accountability systems, the checks and balances that ensure system integration of volunteerism is taking place?

There must be measures that define how volunteer management will be integrated in the organization. Accountability for managing volunteers can be measured using different evaluative tools (for example, quantifiable goals in affiliate/chapter agreements or individual performance objectives). The point is that accountability must be built into the system.

For national organizations, there is an additional issue. Although there may be volunteer management goals and objectives for each region, affiliate or field office, are those goals and objectives consistently met throughout the system? Are there national standards that quantify and qualify what it means to have volunteerism infused throughout the system?

There is no one right or wrong way to integrate a volunteer management system in an organization. No matter the method you decide to adopt to integrate the volunteer function within your organization, remember the following key steps.

- Create a structure that works for your organization.
- Clarify everyone's role within this structure.
- Create accountability measures to ensure that action will be taken. These measures should include quantifiable objectives, timelines and standards that define quality within each step of volunteer management.
- Create and enforce a scheduled review to evaluate the results, i.e., accomplishment of stated objectives.

The Local Volunteer Management Program Model (*see pages 92-93*) provides a model for structuring a local volunteer system so that the volunteer management function is integrated throughout the organization. Notice that the clear roles and tasks provide indicators that can be measured. The next step in creating accountability measures for this program would be to define quantifiable objectives that relate to the tasks outlined and a timeline for meeting those objectives.

The Appendix contains the evaluation tools noted in the Volunteer Management Systems Evaluation chart (*see page 91*). These tools are:

- Paradigm Self-Assessment Survey (with instructions);
- Kellogg Project on Effective Governance Board Self-Assessment Questionnaire;
- American Cancer Society Volunteer Satisfaction Survey;
- Creating and Evaluating Customer Service; and
- The Generic Steps to Outcomes Measurement.

Also, see the Performance Management System Guidelines (*see page 70*).

Volunteer Management Systems Evaluation Chart

What do we want to know?	Why do we want to know this?	Tools used	Data collected	Resources
1. Are our volunteers satisfied?	<ul style="list-style-type: none"> To improve the management of volunteers To increase motivation To improve retention rates of long-term volunteers To increase return rates of short-term, episodic volunteers 	<ul style="list-style-type: none"> To improve the management of volunteers To increase motivation To improve retention rates of long-term volunteers To increase return rates of short-term, episodic volunteers 	Paid staff's and volunteers' perceptions and attitudes	<ul style="list-style-type: none"> Paradigm Self-Assessment Survey (see Appendix) American Cancer Society Volunteer Satisfaction Survey (see Appendix) Kellogg Project on Effective Governance Board Self-Assessment Questionnaire (see Appendix)
2. Are our customers/end users satisfied?	<ul style="list-style-type: none"> To measure success toward achieving organization mission To improve services and information provided to customers/end users To create satisfied customers who will support the organization 	<ul style="list-style-type: none"> Customer service survey (written and/or through interviews) Customer focus groups 	<ul style="list-style-type: none"> Customer perceptions of, and experiences with, the volunteer program Customers' needs and concerns 	Creating and Evaluating Customer Service (see Appendix)
3. Are paid and volunteer staff accomplishing their work?	<ul style="list-style-type: none"> To measure if all staff are meeting their goals To provide corrective action and learning as needed 	<ul style="list-style-type: none"> Performance reviews or appraisals Periodic updates Individual work plans 	Progress in relation to pre-determined activities and personal and organizational goals. Note: Some organizations combine their outcome measurement tool with a personal outcome tool that measures individual progress toward organizations outcomes	<ul style="list-style-type: none"> A Sample Performance Management System (see Chapter 5) Generic forms used to measure progress towards goals (e.g., periodic updates, individual work plans)
4. Are we meeting our goals?	To promote the program both internally and externally	<ul style="list-style-type: none"> Outcome and impact evaluations Strategic plan Current business plan Budget 	<ul style="list-style-type: none"> Quantitative data (numbers of hours, people, and costs) Qualitative data (stories, people's words and actions) that show the actions (outputs) and results (outcomes) of program activities. Qualitative data can also show the long-term benefits of program activities (impact) 	<ul style="list-style-type: none"> The Generic Steps to Outcome Management (see Appendix) <i>Focusing on Program Outcomes: A Guide for United Ways</i> (see Bibliography) <i>The Volunteer Center Benchmarking Measure and Program Measure</i> (see Bibliography)
5. Are we getting there in an effective and efficient manner?	<ul style="list-style-type: none"> To improve the management of volunteers To increase motivation To improve retention rates of long-term volunteers To increase return rates of short-term, episodic volunteers 	<ul style="list-style-type: none"> Business process improvement tools including <ul style="list-style-type: none"> —Root cause analysis (identifying the actual causes of a problem) —Analysis of time spend on a process —Identification of where and when problems occur —Brainstorming on problem identification and solution —Development of standard process —Improvement/streamlining of an existing process —Training evaluations: level 1–5 (see page 89) —Return on investment (ROI), i.e., analysis of the cost of processes compared against eh value of the output of processes 	<ul style="list-style-type: none"> Volunteer attrition and retention rates Cost of processes (in terms of volunteer and staff hours, financial costs) Value of the output of processes (return on investment) Demographic profiles of volunteers Feedback on the effectiveness of the process 	<ul style="list-style-type: none"> <i>The Team Handbook</i> (see Bibliography) <i>Handbook of Training Evaluation and Measurement Methods</i> (see Bibliography)

A Local Volunteer Management Program Model							
© ADAPTED FROM A MODEL DEVELOPED BY SARAH H. ELLISTON, UNITED WAY & COMMUNITY CHEST, 2400 READING ROAD, CINCINNATI, OH 45202							
ROLE TASK	New Volunteer	Experienced Volunteer	Person Who Coordinates Volunteer Program	Paid Staff Person	Executive Director	Board of Trustees	Steering Committee (made up of paid and volunteer staff)
Develop Goals			Develops program goals, action steps and budget		Approves program goals and budget	Approves program goals and adopts budget as part of agency budget	Works with manager to develop goals, action steps, and the budget; represents the budget request to the Board of Trustees (if appropriate)
Develop Budget <i>* See planning at end of chart.</i>			Serves as an internal consultant to the organization	Considers the involvement of volunteers in developing work plan for organization Identifies volunteer opportunities; helps in job design		Receives reports on Volunteer Program	
Job Design			Designs volunteer jobs in collaboration with paid staff		Encourages managers to think of volunteer opportunities in daily activities	Includes volunteer opportunities in long-range plan	Represents the volunteer program to other paid staff when necessary in planning and job design
Recruit and Interview	Applies for volunteer opportunity; participates in interview	Recruits new volunteers	Recruits and interviews volunteers	Recruits volunteers; interviews and screens potential new volunteers		Recruits leadership volunteers	Develops recruitment plan with manager
Orient	Attends orientation	Assists with orientation	Provides orientation	Assists with orientation	Welcomes new volunteers	Assists with orientation	Assists with orientation
Place	Accepts job		Assigns job if appropriate	Accepts placement and provides information about job			
Train	Attends training	Assists with training	Assists paid staff with volunteer training	Provides training			Assists with training if appropriate

ROLE TASK	New Volunteer	Experienced Volunteer	Person Who Coordinates Volunteer Program	Paid Staff Person	Executive Director	Board of Trustees	Steering Committee (made up of paid and volunteer staff)
Supervise	Provides service as assigned	Provides service as assigned (this may include supervising other volunteers.)		Schedules and supervises the volunteer			
On-the-Job Training	Participates in OJT	Provides OJT	Verifies OJT	Provides OJT			
Support	Records hours; attends advanced training	Records hours; attends/ conducts advanced training as appropriate	Maintains volunteer files; provides for advanced training opportunities	Reports hours and other information to coordinator; conducts training as appropriate; coaches	Conducts advance training as appropriate, coaches and supervises		May assist coordinator in maintaining records; works with paid staff to facilitate coaching role, if appropriate
Volunteer Education	Participates in self-evaluation performance appraisal	Participates in self-evaluation performance appraisal	Records performance appraisal results	Participates in volunteer evaluation	May be asked for feedback on volunteer activities		May oversee the performance review process
Program Evaluation	Gives input to the volunteer program evaluation		Collect evaluations, works with steering committee to collate and	Collects evaluations, work with steering committee to collate and report to the executive director	Receives report and gives feedback to the program manager	Receives report; takes any action necessary at the governing policy level	Shares the evaluation report with the board of trustees
Plan		Develops goals and objective for next year in conjunction with the steering committee.		Provides input to the planning process	Receives and approves plan for volunteer program	Receives plan for volunteer program as part of the organizational work plan	Works with program manager, volunteers and paid staff to develop a plan for next year
Recognition		Provide informal rewards for volunteer and paid staff.	Responsible for reward and recognition system for paid and volunteer staff	Provides informal and formal recognition of volunteers and paid staff	Attends recognition events; participates in informal recognition activities for paid & unpaid staff	Participates in informal recognition activities for paid & unpaid staff	Develops recognition plan in collaboration with program manager; assists in implementation

(continued from previous page)

8

TECHNOLOGY

This chapter highlights how technology can be used in managing volunteer systems.

■ Jump Start

By exploring answers to the following questions, you will see the capabilities of technology for your own agency and volunteer management system.

- If your agency has a Web site, is there a place for people to offer their volunteer services? Is there a section listing employment opportunities? If yes to either, how is the information captured (*see Recruit, page 98*)?
- Does your human resource database have the capability to track volunteer resources? Is this capability also available within your donor management software (*see Critique, page 100*)?
- If you have specific volunteer management software, what are the merge capabilities with other software (*see Cultivate, page 99*)?
- Do you use an agency Intranet to provide any of your employee orientation, training, or other information, such as newsletters? Are other forms of training offered via computer (*see Cultivate, page 99*)?
- What needs do you have for keeping track of volunteers?
- Is any part of your human resources performance management process done via computer? This can include updating position descriptions, performance feedback, skill and competency banking, and career development assessment. (*see Critique and Rewards, pages 100 and 101*).

ALL LEVELS

Understand the key elements and capabilities of managing human resources with technology tools.

COMMUNITY

Determine how technology can assist you in tracking skills and recruitment records of volunteers.

STATE/REGIONAL

Gain knowledge of software capabilities to manage staff and volunteer records.

NATIONAL

Build on all the above to manage not only staff and volunteer resources, but career development assessment for staff.

Introduction

Technology today is a driving force for both work and personal use. Everyone, of all ages, is using computers to learn, make decisions and purchases, manage finances, entertain and communicate. New dot.com businesses are started every day. E-commerce is thriving. Your own agency probably has a Web site that, at a minimum, posts information about the mission of your organization and disease-specific information. From the systems viewpoint, we will look at some of these capabilities.

One caveat to technology and human resource management: It's the people that matter. Computers, software, and databases are useless until someone tells them what to do. Unless you use them effectively and efficiently to accomplish a specific end, they are of no value.

◆ WIIFY: Technology Immersion

Years ago, a consulting colleague purchased her first computer. She believed it was critical to understand how it worked before she used it. For a week, she studiously read all the background manuals on bits and bytes and motherboards. During this time, the computer sat on her desk without being turned on. After endless reading, she came to the realization that if technology was going to work for her, she had to turn to the computer itself and explore what it had to offer.

Don't be intimidated by the speed with which technology changes. New software and technologies are born every nanosecond. Organizations may not always be able to afford the newest technology. Your challenge is to explore the possibilities and shape them to your needs and resources, and to update them as necessary to remain current. You don't have to do it all: Whatever you do will be worthwhile.

The key to working with technology is to stay with it, but not get overwhelmed by it. At any level of volunteer management, some form of technology will create efficiencies for you. As with finding the correct volunteer match, determining the right technology match is just as important.

What's Your Technology Savvy?

DEFINE THE FOLLOWING:

WWW	JIT
_____	_____
_____	_____
HTML	LDL
_____	_____
_____	_____
HTTP	MIME
_____	_____
_____	_____
URL	Baud
_____	_____
_____	_____
LAN	Search engine
_____	_____
_____	_____
ISP	Internet
_____	_____
_____	_____
CBT	Intranet
_____	_____
_____	_____
DVD	Browser
_____	_____
_____	_____

The technologically savvy will know them all, but just in case, here are the answers:

WWW	World Wide Web
HTML	Hyper Text Markup Language — looks like old fashioned typesetting code. Used to create HyperText documents for use on the WWW.
HTTP	Hyper Text Transport Protocol — protocol for moving hypertext (any text that contains links to other documents) across the Internet.
URL	Uniform Resource Locator— the standard way to give an address of any resource on the Internet.
LAN	Local Area Network — a computer network limited to an immediate area (you may hear the term ethernet with this, which is a way to network the LAN)
ISP	Internet Service Provider
CBT	Computer-Based Training
DVD	Digital Video Disk
JIT	Just in Time (a method of learning)
LDL	Long Distance Learning
MIME	Multipurpose Internet Mail Extensions— a standard for attaching non-text files to standard Internet mail messages
Baud	How many bits per second a modem can send or receive
Search engine	Similar to the library card catalogues or microfiche — Yahoo and Excite are examples
Internet	Universal access to what is available on the World Wide Web
Intranet	Protected, secure site on the web — generally within a company/organization
Browser	A road map for the Internet; provides direction and means to get users where they need to go

● Case In Point

Several associations we have worked with in the last ten years decided to purchase and customize their donor-management software. Decision making about issues surrounding needs and capabilities did not reach all levels of each association. In one case, the association ended up scrapping the entire original package due to application problems. In another, the end users rebelled greatly about using the software since the applications did not fit their field-based needs.

To avoid similar problems, decision-making about, and acceptance of, technology must reach all levels of your organization. This does not require technological genius. It means speaking to all end users and involving them in discussions about organizational needs and potential uses of technology. Once you have their buy-in, it will be easier to move forward.

Since we view volunteer management as an integral component of your human resource management system, we apply the same technological potential capabilities for volunteer systems as are now used for human resource systems. Various software programs are available to enable you to track many processes, including human resource tasks, such as recruiting, skill screening, evaluating, tracking time and hours and training.

Technology for Integrated Volunteer Management Systems

Below are tables of resources that relate to the components of an integrated human resources system. These tables provide a small sampling of the technology that can help you recruit, cultivate, critique and reward volunteers.

Recruit

Staff and volunteer recruitment entered a new era within the last few years. Employers and organizations are utilizing the Internet to post positions and locate résumés of potential candidates. There are specialized Web sites designed for career search, such as CareerMosaic.com, Jobfinder.com, monster.com, and classified.yahoo.com. Specialized software is also available to do an initial screening of applicants by matching key words of desired job skills with words in résumés. Prescreening testing, where legal, can be done via computer.

Due to distance, interviews often are done via video and computer. Companies are using their Intranet to place promotion opportunities, as well as list summary résumés and skill banks for managers to search when they are hiring internally or when assembling project teams.

Most recently, America Online jumped into the volunteer arena and developed a specific Web site that handles many issues regarding volunteering and philanthropy. Helping.org is the

main site; VolunteerMatch is the search engine for specific volunteer opportunities. Impactonline acts as a monitoring and measuring tool for the matching service. Visit Helping.org to see the possibilities for your agency.

Recruitment-Related Technology for Volunteer Management Systems

<i>Recruit</i>	<i>Technology</i>
Applicant screening via skills	HRMS software
Distance interviewing	Computer video
Skill/competency banking	HRMS software
Volunteer matching	Helping.org; volunteermatch.org; impactonline.org
Post jobs/projects	Your own Web site Helping.org; CareerMosaic.com; JobFinder.com; monster.com, classified.yahoo.com

Cultivate

There are myriad computerized resources for cultivating volunteers and paid staff. Companies have created online orientation programs that employees and volunteers can access at their own pace. Policy manuals and employee handbooks with commonly used forms are often available online. Employee newsletters also may be transmitted online. People are now sharing information and ideas through virtual workgroups from distant locations. Conferences are being held online. Professional development is possible through a variety of new cutting-edge technologies including CD-ROM; on-line training; satellites; interactive television programs; and organizational Intranets. Computer-based training programs are now readily accessible. Your local chapter of the American Society for Training and Development can refer you to a listing of vendors. Customized training can be created for your organization’s specific programs and events and accessed by anyone.

Of course, there is also e-mail, which enables efficient delivery of communication where face-to-face contact is not critical. Recent studies showed an 86% increase in the use of e-mail during the first six months of 1999.

Cultivation-Related Technology for Volunteer Management Systems

<i>Cultivate</i>	<i>Technology</i>
Orientation	Computer-based tutorials; online via organization Intranet
Human resource items such as employee handbooks, policies, newsletter	Online via organization Intranet
Event/program information	Web site, Intranet
Training	Computer-based training, online via organization Intranet
Meetings and conferences	Computer online with video stream; Interactive TV

Critique

Many employee and volunteer software databases are now available for critiquing volunteers' performance. We have reviewed several volunteer management software programs and there is a chart outlining their offerings at the end of this chapter. Several voluntary health agencies have purchased customized database programs that have a module for volunteer tracking. With all of these programs, it is essential to remember they are only as good as the information you enter. Also, it is important to look at the report-writing features of each — to use the program as a management tool it must generate reports that will support your management needs. Check with your Human Resource Department to see what human resource management system programs it currently utilizes and how the program can be adapted to volunteer management.

Critique-Related Technology for Volunteer Management Systems

<i>Critique</i>	<i>Technology</i>
Hours tracking	Volunteer management software; some donor management software; Human Resource Management System software
Evaluation	Competency management software; Human Resource Management System software
Competency development	Competency management and goal setting software
Feedback	Competency management software; specific performance feedback software



Toolbox

Online Training

Is classroom training obsolete? No, but a combination of training methods is gaining importance. People have less time, and trainers need to meet the dual need of teaching critical skills and competencies with less face time with learners. One new method is called “chunking,” or paring down what used to be a one-day course into a half-day, or a half-day training into 30-minute segments. Another method is a combination of computer training with face time.

If you are going to use online or other computer-based training, here are a few things to think about:

- Just as we don't have time to read Tolstoy's *War and Peace* in one sitting, we cannot put an entire training manual online and think that learning will occur. Text online is very boring. You must get creative. Many people have their first computer experience through games or animated Web sites. Think of the reaction of a learner seeing your online manual with nothing but text.
- Talk to your information systems staff. They can help guide you through the maze of what will work and what will not. If you are purchasing computer-based training, will it fit on all platforms? Does it require sound and video? There are programs available, and non-profit budgets may not support them all.
- The “soft stuff.” This journey is about competencies, which in some venues are still referred to as soft skills. There are some really great computer-based training programs that deal with competency training, but they must be tied into software application training – what will be the transfer of learning to a real life scenario? You also can build a training program that utilizes online or computer-based training in combination with case study or role play.
- Chunk it. This does not mean get rid of training. To the contrary, this means develop training programs that have golden nuggets of information that are accessible in bits at a time.
- Training on company time. Yes, your volunteers and staff have computers at home. That does not mean they will learn agency-required information at home on their own time. It should be viewed as part of the project requirement and factored into time.

Reward

To reward and recognize, you can use your organization's Intranet to highlight employee and volunteer achievements. Since technology is so profound in everyone's life, you can reward folks with educational CDs. The bargain baskets at CompUSA, Best Buy and Office Depot offer inexpensive software games and programs. Another idea is to scan photos of volunteers active at your events and programs and post them regularly — always keeping in mind your organization's confidentiality requirements.

Interview volunteers and employees on tips of the day they may have for others and post them via your Intranet, acknowledging the volunteer or employee who provided the tip.

Reward-Related Technology for Volunteer Management Systems

<i>Rewards/Recognition</i>	<i>Technology</i>
Employee/volunteer successes	Written acknowledgement via Intranets; group e-mails; gifts via e-commerce sites
Promotions/advancement	Internal posting and acknowledgement

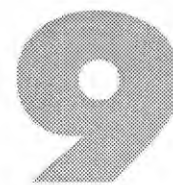
A Final Word on Tracking Volunteer Resources

Another compelling reason to track data on volunteer involvement is the pressing need to provide numbers to our funders. What can we show as the direct result of volunteer involvement to the bottom line of an organization in terms of output? (*Refer back to Chapter 7, Accountability.*)

In human resources we track each employee as an asset and an expense. The same approach should apply to volunteer resources. Tracking volunteers in this way can be difficult, because many of us grew up in an environment in which volunteers brought emotion and passion to the cause, and we were therefore expected to be grateful, even when they did not have the skills the organization required. When organizations started to track volunteers because of a business need, some people in the voluntary health agency field worried it would take away from the passion. However, when an organization begins to see a return on its investment in tracking, i.e., increased funding and improved program outcomes, it will understand this system — tracking and matching the right volunteers to the right job — will only add to the passion.

Volunteer Management Software

	Volunteer Reporter	Volunteer Reporter Professional	RSVP Reporter	Volunteer Works	Samaritan
BASICS					
Name	■	■	■	■	■
Address	■	■	■	■	■
Phone	■	■	■	■	■
E-mail				■	■
Hours delivered	■	■	■	■	■
Birthdays & ages	■	■	■	■	■
Assignments				■	■
Schedule				■	■
Skills, interests, preferences	■	■	■	■	■
Recognition				■	■
Training delivered				■	■
Emergency contacts				■	■
Customized medical information				■	■
References				■	■
Notes/comments		■	■	■	■
SEARCH FEATURES					
Filters for limiting chosen words		■	■	■	■
View or print filter queries		■	■	■	■
Save filters for future use				■	■
BACKUP FEATURES					
Industry-standard Zip files	■	■	■		■
Comprehensive data conversion svcs.				■	■
REPORTS / PRINTING FEATURES					
"Household" records (send one communication to family as a group)					■
Writing letters	■	■	■	■	■
Printing labels	■	■	■	■	■
Designing and printing reports	■	■	■	■	■
Mail merge/docs created inside report		■	■	■	■
I/D cards printed w/barcodes				■	■
MANAGEMENT FEATURES					
Customized fields/templates		■	■	■	■
Password protection	■	■	■	■	■
Add/Edit fields, layout, reports	■	■	■	■	■
Time sheets	■	■	■	■	■
Scheduling		■		■	■
Spreadsheets		■	■	■	■
Analysis of data					
Identifies duplicate records				■	■
TECHNICAL SUPPORT					
Supports Windows 95/98/NT		■	■	■	■
Intranet/Network access		■	■	■	■
Internet access				■	■
On-line/telephone tech support	■	■	■	■	■
Support as part of purchase/lease	■	■	■	■	■
Optional training opportunities				■	■
Help screen					■



RESOURCES FOR MANAGERS OF VOLUNTEERS

This chapter lists resources — publications, Web sites and organizations — that can help people who manage volunteers. For a comprehensive bibliography on volunteer management, see Steve McCurley's volunteer management bibliography at www.energizeinc.com.

For a sampling of the best in volunteerism resources, we went straight to the sources — people who work at varying levels within the field. The following provides the contact information of the individuals we contacted, followed by the resources each recommends.

Top Picks of Volunteerism Resources

Sherril K. Williams, President and CEO

Prevent Blindness Ohio

(614) 464-2020 phone (614) 481-9670 fax

112020.2634@compuserve.com

- “Non-Profit Times” newspaper (www.nptimes.com)
- National Health Council (*see page 106*)
- National Center for Nonprofit Boards (*see page 108*)
- Association for Volunteer Administration (*see page 110*)
- Case Western Reserve University — Mandel Center on Nonprofit Management (www.cwru.edu/mandelcenter)
- Formal and informal exchanges with Prevent Blindness colleagues
- Local volunteer centers (*see page 107*)
- Local United Way (www.unitedway.org)

Kathleen Enright, Director of Marketing and Public Relations

National Center for Nonprofit Boards

(202) 452-6262 phone (202) 452-6299 fax

kenright@ncnb.org

- Energize, Inc — a comprehensive electronic resource that includes links to volunteer and nonprofit management websites and organizations throughout the world, a job bank, library, bookstore and “hot topics” volunteerism chat rooms (www.energizeinc.com)
- *The Volunteer Management Handbook*, Tracy D. Connors. John Wiley & Sons, 1995
- *All Hands on Board: The Board of Directors in an All-Volunteer Organization*, Jan Masaoka. National Center for Nonprofit Boards & Support Center for Nonprofit Management, 1999
- *The Board's Role in Effective Volunteer Management*, Susan Ellis. National Center for Nonprofit Boards, 1995
- *The Nonprofit Handbook: Management*, Tracy D. Connors. John Wiley & Sons, 1997
- *The Jossey-Bass Handbook of Nonprofit Leadership and Management*. Jossey-Bass Publishers, 1994

- Local corporate volunteer council (see page 107)
- The Points of Light Foundation (see page 108)
- Internet Nonprofit Center (www.nonprofit-info.org/npofaq)
- *The Gold Book*, published annually by the American Symphony Orchestra League (www.symphony.org)

Nancy Macduff, Senior Advisor for Educational and Training Services

The Points of Light Foundation

(202) 729-3243 phone (202) 729-8105 fax

nmacduff@pointsoflight.org

- *Volunteer Recruiting and Retention: A Marketing Approach*, Nancy Macduff. MBA Publishing, 1985
- CYBERVPM - contains both an online collection of information on volunteer management from a wide variety of sources and an online discussion group for volunteer managers (www.cybervpm.com)
- "Grapevine Newsletter" (shm12@aol.com)
- *Building Effective Volunteer Committees*, Nancy Macduff. MBA Publishing, 1985
- *Volunteer Management: Mobilizing All the Resources of the Community*, Steve McCurley and Rick Lynch. Heritage Arts, 1996
- "Chronicle of Philanthropy" magazine (www.philanthropy.com)
- *The Jossey-Bass Handbook of Nonprofit Management*. Jossey-Bass Publishers, 1994
- *The Volunteer Management Handbook*, Tracy D. Conners. John Wiley & Sons, 1995
- Energize, Inc. (www.energizeinc.com), with the best bibliography of information on volunteer management

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- Energize, Inc. (www.energizeinc.com)
- Virtual volunteering project (www.serviceleader.org/vv/index.html)
- Charity Village (www.charityvillage.com)
- CyberVPM Online Discussion List. Subscribe at www.cybervpm.com/cybervpm.htm
- *Volunteer Management: Mobilizing All the Resources of the Community*, Steve McCurley and Rick Lynch. Heritage Arts, 1996
- *The Volunteer Recruitment Book*, Susan Ellis. Energize, 1994
- *The Volunteer Management Handbook*, Tracy D. Conners. John Wiley & Sons, 1995
- *Exploring Volunteer Space*, Ivan Scheier. Center for Creative Community, 1980
- *The Journal of Volunteer Administration*, a periodical published by the Association for Volunteer Administration (see page 110)
- *Nonprofit Management and Leadership*, a periodical published by the Association for Research on Nonprofit Organizations and Voluntary Action (see page 110)

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- *Wisdom of Teams* by Jon R. Katzenbach and Douglas R. Smith. Harvard Business School Press, 1994
- *Managing the Nonprofit Organization*, Peter Drucker. HarperCollins, 1990
- *Megatrends and Volunteerism*, Sue Vineyard. Heritage Arts, 1993
- *The Human Equation*, Jeffrey Pfeffer. Harvard Business School Press, 1998
- *Competency-Based Performance Improvement*, David Dubois. HRD Press, 1993
- *The Change Masters*, Rosabeth Moss Kantor. Simon and Schuster, 1983 (still one of the best)
- *Flawless Consulting*, Peter Block. Pfeiffer and Co, 1981
- *The Skilled Facilitator*, Roger M. Schwarz. Jossey-Bass, 1994
- *Collaboration Handbook*. Amherst Wilder Foundation, 1994
- www.workforceonline.com – an online site dedicated to all aspects of managing human resources including trends, implementation ideas and forms, policies and checklists that can be downloaded.

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Washington, DC 20036-4505

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Virginia Office: (703) 455-8689

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- The American Society of Training and Development's "Info-Lines." Succinct, how-to guides on dozens of topics related to training, organizational development, management, evaluation and more (www.astd.org)
- "Training & Development" magazine from the American Society of Training and Development (www.astd.org)
- *The Managing Diversity Survival Guide* by Lee Gardenswartz and Anita Rowe. Irwin Professional Publishing, 1994
- *Why Change Doesn't Work*, Harvey Robbins and Michael Finley. Pace Setter Books, 1996
- *Volunteer Management: Mobilizing All the Resources of the Community*, Steve McCurley and Rick Lynch. Heritage Arts, 1996
- www.energize.com
- *The Team Handbook*, Peter R. Scholtes. Joiner, 1988
- "Fast Company" magazine (www.fastcompany.com)
- *Performance Consulting*, Dana Gaines Robinson and James C Robinson. Berrett Koehler Publishers, 1995
- www.e-volunteerism.com — an online journal dedicated to discussion of cutting-edge volunteer management issues

Top Ten Best-Selling Volunteer Management Books

We turned to one of the largest volunteerism catalog services for a list of the ten best-selling volunteer management books in the United States. To order from The Points of Light Foundation catalog, call 1-800-272-8306, or visit their web site at www.pointsoflight.org.

1. *Volunteer Management: Mobilizing all the Resources of the Community* by Steve McCurley and Rick Lynch
2. *101 Ideas for Volunteer Programs* by Steve McCurley and Sue Vineyard
3. *Ignite the Community Spirit: 300 Creative Ideas for Community Involvement* by Joy J. Golliver
4. *Beyond Banquets, Plaques and Pins: Creative Ways to Recognize Volunteers and Staff!* by Sue Vineyard
5. *Measuring the Difference Volunteers Make: A Guide to Outcome Evaluation for Volunteer Program Managers* by the Minnesota Department of Human Services
6. *Developing a Corporate Volunteer Program: Guidelines for Success* published by The Points of Light Foundation
7. *The Kids' Guide to Service Projects: Over 500 Service Ideas for Young People Who Want to Make a Difference* by Barbara A. Lewis
8. *Episodic Volunteering: Building the Short-Term Volunteer Program* by Nancy Macduff
9. *Best Practices in Employee Volunteer Programs* by Sue Vineyard and published by The Points of Light Foundation
10. *Children as Volunteers* by Susan J. Ellis, Anne Weisbord and Katherine H. Noyes

Resource Organizations

Below are resource organizations that can provide access to valuable information and networks for people who manage volunteers. For other resource listings of volunteer management-related organizations, see www.energize.com and www.pointsoflight.org.

National Health Council

1730 M Street, NW

Washington, DC 20036-4505

(202) 785-3910 phone

(202) 785-5923 fax

info@nhcouncil.org

www.nhcouncil.org

The National Health Council, a private, nonprofit umbrella organization of more than 115 national health-related organizations, works to ensure quality health care for all people. The Council serves as a resource for its voluntary health agency members, which represent approximately 100 million people with chronic diseases and/or disabilities. The Council also conducts research to inform the efforts of all its member organizations; provides valuable information to its members and others in the health community through its many comprehensive, nationwide programs; and conducts educational programs on cutting-edge issues.

Volunteer Centers

A volunteer center is a local/regional organization that serves the community in a number of ways. Some of the major functions of volunteer centers include:

- Promoting volunteerism within the community;
- Training and assisting nonprofit organizations;
- Recruiting and referring volunteers; and
- Recognizing volunteers' contributions.

Many volunteer centers also conduct individual programs designed to mobilize volunteers to solve community problems. Volunteer centers are the largest national infrastructure dedicated to volunteerism. They are a key resource, as two-thirds of the American population live in areas serviced by such a center. To find your nearest volunteer center, contact The Points of Light Foundation (phone 1-800-volunteer or www.pointsoflight.org.)

Corporate Volunteer Councils

A Corporate Volunteer Council is a coalition of corporations that have active programs in employee/retiree volunteer involvement, or an interest in starting such programs. CVCs are formed to provide corporations with the opportunity to:

- Participate in professional development opportunities to advance their careers in corporate community relations and employee volunteer management.
- Learn about the need for employee volunteers to address serious social problems in the community, and community service agencies and their needs for employee volunteers.
- Work with other companies on a community need or social problem that has been cooperatively identified and is too large or complex for one company to handle alone.
- Initiate a community recruitment and/or recognition event for corporate volunteers.

CVCs typically work in partnership with the local volunteer center or United Way to identify community needs and their responses to them. Contact The Points of Light Foundation or visit their Web site to locate the CVC or volunteer center in your community (phone 202-729-8000 or www.pointsoflight.org.)

The Points of Light Foundation

1400 Eye Street, NW Suite 800

Washington, DC 20005

(202) 729-8000 phone (202) 729-8100 fax

Volnet@pointsoflight.org www.pointsoflight.org

The Points of Light Foundation works to involve more people, more effectively, in community service. This is accomplished through a variety of volunteer initiatives, volunteerism services and products, the largest annual conference on community service, and membership programs. The Foundation offers three membership categories with benefits tailored to meet each market's specific needs and priorities: corporate, non-profit and government. Foundation members have access to the latest trends, statistics, and best practices in the field through *Volunteer Leadership* magazine, and the *Corporate Alert*, *Connecting the Points* and *The Volunteer Center Bulletin* newsletters.

National Center for Nonprofit Boards

1828 L Street, NW, Suite 900

Washington DC 20036

1-800-883-6262 or (202) 452-6262 phone (202) 452-6299 fax

ncnb@ncnb.org www.ncnb.org

The National Center for Nonprofit Boards is dedicated to increasing the effectiveness of nonprofit organizations by strengthening their boards of directors. Through its programs and services, NCNB:

- Provides solutions and tools to improve board performance.
- Acts as conveyer and facilitator in the development of knowledge about boards.
- Promotes change and innovation to strengthen governance.
- Serves as an advocate for the value of board service and the importance of effective governance.

Nonprofit Risk Management Center

1001 Connecticut Avenue, NW, Suite 410

Washington, DC 20036

(202) 785-3891

www.nonprofitrisk.org

The mission of the Nonprofit Risk Management Center is to meet the risk management and insurance needs of community-serving organizations through research, education and advocacy. The Center:

- Delivers informative workshops and seminars;
- Publishes books, resource guides, and pamphlets;
- Conducts risk management audits of policies and procedures;
- Offers consultation regarding the sponsorship of group insurance programs; and
- Advises on a wide range of management practices.

Independent Sector

1200 18th Street, NW, 2nd floor

Washington, DC 20036

(202) 467-6100 phone (202) 467-6101 fax

<http://www.IndependentSector.org>

Independent Sector is a national nonprofit membership organization consisting of over 700 charities, foundations, and corporate philanthropy programs. IS seeks to encourage giving, volunteering and not-for-profit initiatives through public education, research and advocacy that will help create a better society.

American Society of Directors of Volunteer Services

One North Franklin, 3 1st Floor

Chicago, IL 60606

422-3939 phone (312) 422-4575 fax

www.asdvs.org

Members of the American Society of Directors of Volunteer Services are employed and recognized by the administrators of health care institutions as having major and continuing responsibility for the volunteer service programs within such organizations. The ASDVS provides professional certification, reduced-rate access to the American Hospital Association Resource Center and publications, an online store and an annual conference for volunteer managers within health care settings.

Association for Volunteer Administration

P.O. Box 32092

3108 N. Parham Road, Suite 200-B

Richmond, VA 23294

(804) 346-2266 phone

(804) 346-3318 fax

ava@freedomnet.com

www.avaintl.org

The Association for Volunteer Administration is an international professional membership association for individuals working in the field of volunteer management. The AVA provides:

- Linkages and resources to maximize volunteer involvement;
- Worldwide networking opportunities with persons who manage volunteers;
- Professional credentialing;
- Opportunities to build skills and expertise;
- Advocacy for the value of volunteer manager's roles;
- Information on current trends and news that affects volunteer managers, including a quarterly journal; and
- An annual international conference.

Association for Research on Nonprofit Organizations and Voluntary Action

c/o Indiana University Center on Philanthropy

550 West North Street, Suite 301

Indianapolis, IN 46202-3162

(317) 684-2120 phone

(317) 684-2128 fax

www.arnova.org

The Association for Research on Nonprofit Organizations and Voluntary Action is an international, interdisciplinary network of scholars and nonprofit leaders fostering the creation, application and dissemination of research on voluntary action, nonprofit organizations, philanthropy and civil society. Principal activities include an annual conference, publications — including *Nonprofit and Voluntary Sector Quarterly* — and electronic discussions.

International Association for Volunteer Effort

1400 Eye Street NW, Suite 800

Washington DC 20005

(202) 729-8250 phone

(202) 729-8105 fax

iave@pointsoflight.org

The International Association for Volunteer Effort (IAVE) promotes, supports and celebrates volunteering as it occurs throughout the world. It is the worldwide membership organization that exists to promote expanded and more effective volunteering. Founded in 1970, IAVE sponsors a biennial conference, regional conferences and training events, and a newsletter for its members. IAVE has assumed a major leadership role for the International Year of Volunteers 2001 in cooperation with United Nations Volunteers. IAVE also supports the development of strong national and local volunteer centers throughout the world as the primary leadership organizations for volunteering in their countries.

How To Find Effective Volunteer Management System Consultants

There is an increasing use of external consultants in associations today. Below are ideas to help you determine the right fit between you and a potential consultant.

NEEDS

Prior to meeting with a potential consultant, make sure that you have determined what you need to achieve when a contract is completed. If you are not sure yourself what the presenting need is for your association, a consultant may propose the wrong end result.

EXPERIENCE

You are looking for a person who can relate to your present need. Determine whether a consultant has specific expertise in that area. Look for similar consulting projects and programs they have conducted in the area. Have they worked in the field? Do they have related experience? Have they conducted seminars, delivered workshops or written articles on a similar topic? Ask for their complete résumé.

REFERENCES

Ask the consultant to provide references or a client list with names and numbers of contacts. Don't rely on a packet of client recommendation letters. Such letters are usually developed at the request of a consultant and only report the glowing successes. You want to talk with past clients themselves so you can ask probing questions.

OTHER PROJECTS

Consultants should be able to provide a list of successful projects and contracts. Ask to see end results from such projects and client contacts. Even the best consultants do not hit a home run with each contract, many times for solid reasons. The discussion about their past results may tell you a lot about the consultant.

TIME

One can expect that a successful consultant is in demand and will have several projects going at once. You want to make sure there is a balance in their work with you and other clients. If they have all the time in the world for you, it may be that no one wants them. Beware of the in-demand consultant who sits in on the first meeting to finalize a deal and then sends in a substitute you have not met. Determine up front who you will be working with and make sure you meet with them. Chemistry is important in any client/consulting relationship.

COST

This will vary considerably, depending on the project, amount of time, end results required and numbers of people involved. The well-known, book-published consultants likely will request higher fees. There are consultants who are just getting established and are willing to charge a smaller fee to establish themselves. Ask the consultant to give you a proposal based on projected outcomes. If the project is a long-term one, ask them for projected timelines with deliverables. In longer contracts, consultants will sometimes ask for a certain amount up front in payment as they begin the work — this is quite common. Clearly define in the contract what other expenses you will or will not cover, such as travel and long distance phone calls.

CHEMISTRY

The right chemistry is critical. A consultant must fit into the organizational culture, and be able to gain respect and confidence. In this way, the consultant will be able to achieve much more and gain cooperation to accomplish the desired end results.

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APPENDIX: TOOLS & FORMS

The Paradigm Self-Assessment Survey Instructions

The Points of Light Foundation's Paradigm Self-Assessment Survey has been extensively field-tested and proven to be effective in helping an organization (or organizational unit) examine the effectiveness of its volunteer management system. To best administer this assessment, follow these steps:

1. Get leadership commitment first. **Do not** conduct any organizational assessment unless you are willing and empowered to follow through on the issues that are raised. Asking for people's opinions and then not taking actions on those issues can cause serious damage within organizations.
2. Understand how to administer this survey and the rationale behind the questions by reading *Creating More Effective Volunteer Involvement*, by Kenn Allen, The Points of Light Foundation, 1995; or *The Paradigm Self-Assessment Kit*, The Points of Light Foundation, 1995.
3. Create an assessment leadership team who will:
 - *Plan the overall effort.*
 - *Build support for the process throughout the organization.*
 - *Analyze the results of the survey.*
 - *Stimulate dialogue on how best to use those results.*
4. As a team, plan the timeline and process for introducing the survey into the organization.
5. Build internal support for this assessment process. This includes communicating the purpose of the survey to paid staff, volunteers and managers.
6. Collect the data. Have all major stakeholders complete the survey. This includes

APPENDIX

the board of directors, senior managers, line managers, line staff (both professional and support) and volunteers other than the board.

7. Tabulate the results. Look for the following: overall high scores indicating strengths; overall low scores that may indicate problem areas; and gaps between paid staff and volunteers' scores that may indicate lack of communication and potential problem areas.

8. Analyze and discuss the results with the organization. Frame the results in terms of organizational strengths, areas for improvement and organizational assets to implement changes. Refer to Chapter 3 on Organizational Change Management for strategies on implementing change within a volunteer management system.

Changing the Paradigm Self-Assessment Survey

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Please indicate whether you are a:

- Board or advisory committee member?
- Paid staff member?
- Volunteer other than a board or committee?
- Other: _____

SURVEY

For each of the statements below, indicate how frequently you believe the statement is true for this organization. Record the number value for each of your responses on the scoring sheet.

Almost Never 1	Occasionally 2	Sometimes 3	Often 4	Always 5
<p>___1. Everyone involved with the organization has a clear idea of the role volunteers should play in the organization.</p> <p>___2. People throughout the organization believe that volunteers are making a positive contribution.</p> <p>___3. The jobs done by volunteers contribute directly to achieving the current priorities of the organization.</p> <p>___4. The work that volunteers are asked to do includes many jobs other than fund-raising.</p> <p>___5. Volunteers at all levels feel respected and valued by the organization.</p> <p>___6. When the work of the organization is discussed, it is in terms of the community problems we are trying to solve, rather than our immediate organizational problems.</p> <p>___7. The board of directors actively encourages the involvement of volunteers in all aspects of the organization's work.</p> <p>___8. The executive director of the organization actively encourages the involvement of volunteers in all aspects of the organization's work.</p> <p>___9. Managers of the organization's programs agree on the importance of involving volunteers throughout the organization.</p> <p>___10. There is a person who plays a primary leadership role in promoting and organizing volunteering in the organization.</p> <p>___11. The people actually doing the primary work of the organization are responsible for supervising volunteers as part of their jobs.</p> <p>___12. Obstacles to volunteer involvement are viewed as problems to be solved rather than as excuses.</p>	<p>___13. Those people who actually deliver the services or manage the programs of the organization have the responsibility for deciding whether and how volunteers will be involved with them.</p> <p>___14. Volunteers and paid staff work well together as a team.</p> <p>___15. Paid staff at all levels feel respected and valued by the organization.</p> <p>___16. Tensions or problems between paid staff and volunteers are acknowledged and dealt with in a positive way.</p> <p>___17. Stories of the contributions of volunteers are told by both paid staff and volunteers.</p> <p>___18. The work of volunteers may be different from that of paid staff, but it is not viewed as inferior.</p> <p>___19. The organization strives to continually improve the management of volunteers.</p> <p>___20. Volunteers regularly are asked to evaluate their involvement in the organization, including the way they are managed.</p> <p>___21. When looking at work that needs to be done, deliberate efforts are made to find jobs for volunteers.</p> <p>___22. People whom the organization serves are also involved as volunteers within the organization.</p> <p>___23. The organization tries to recruit volunteers who will reflect the diversity of the community: age, race, income level, etc.</p> <p>___24. People in the organization are interested in learning ways to involve volunteers more effectively.</p>			

(continued on page 120)

Changing the Paradigm Self-Assessment Survey

(continued from page 119)

SURVEY SCORING SHEET

Copy your answers in the spaces below corresponding to the number of each question, and then total each column:

<p>I.</p> <p>1. ____</p> <p>2. ____</p> <p>3. ____</p> <p>4. ____</p> <p>5. ____</p> <p>6. ____</p> <p>Total ____</p>	<p>II.</p> <p>7. ____</p> <p>8. ____</p> <p>9. ____</p> <p>10. ____</p> <p>11. ____</p> <p>12. ____</p> <p>Total ____</p>
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<p>I.</p> <p>13. ____</p> <p>14. ____</p> <p>15. ____</p> <p>16. ____</p> <p>17. ____</p> <p>18. ____</p> <p>Total ____</p>	<p>II.</p> <p>19. ____</p> <p>20. ____</p> <p>21. ____</p> <p>22. ____</p> <p>23. ____</p> <p>24. ____</p> <p>Total ____</p>
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I. Lay the Foundation through Mission and Vision

This action principle examines the extent to which the organization has a core value for its existence that is communicated with and shared by staff and volunteers, and the extent to which there is a vision for how volunteers fit into the attainment of that mission.

Total Score: ____

II. Combine Inspiring Leadership with Effective Management

This action principle examines the extent to which the organization has administrative structures and clear direction that will enable it to encourage and facilitate high-impact volunteer involvement.

Total Score: ____

III. Build Understanding and Collaboration

This action principle examines the extent to which staff and volunteers are viewed as valued contributors to the organization and work together as partners in a team effort to accomplish the work of the organization.

Total Score: ____

IV. Learn, Grow, and Change

This action principle examines the extent to which the organization is dynamically examining and attempting to improve its operation, including the continuous effort to broaden its volunteer base to include all segments of the community.

Total Score: ____

Kellogg Project on Effective Governance

© HOLLAND, BLACKMAN AND ASSOCIATES, 2000

The questionnaire below can be used to examine board members' perceptions about their effectiveness. You may analyze the data by looking for trends in strengths and challenges perceived by the board members. Scored assessment sheets are available from Holland, Blackman and Associates (Phone: 706-548-4115).

BOARD SELF-ASSESSMENT QUESTIONNAIRE

Thank you for participating in this study of non-profit organization boards. The following statements describe a variety of possible actions by boards. Some of the statements may represent your own experiences as a member of your board, while others may not. For each of the items, there are four possible choices. Please mark with a check the choice that most accurately describes your experience as a member of this board. There are no right or wrong answers; your personal views are what is important. In order to ensure the anonymity of all responses, please do not put your name anywhere on the form. After you have completed all the items, please fold the form, insert it into the envelope provided, and drop it in the mail.

1. **This board takes regular steps to keep informed about important trends in the larger environment that might affect the organization.**

Strongly Agree Agree Disagree Strongly Disagree

2. **I have participated in board discussions about what we should do differently as a result of a mistake the board made.**

Strongly Agree Agree Disagree Strongly Disagree

3. **I have had conversations with other members of this board regarding common interests we share outside this organization.**

Strongly Agree Agree Disagree Strongly Disagree

4. **I have been in board meetings where it seemed that the subtleties of the issues we dealt with escaped the awareness of a number of the members.**

Strongly Agree Agree Disagree Strongly Disagree

5. **Our board explicitly examines the "downside" or possible pitfalls of any important decision it is about to make.**

Strongly Agree Agree Disagree Strongly Disagree

6. **Orientation programs for new board members specifically include a segment about the organization's history and traditions.**

Strongly Agree Agree Disagree Strongly Disagree

- 7. This board is more involved in trying to put out fires than in preparing for the future.**
 Strongly Agree Agree Disagree Strongly Disagree
- 8. The board sets clear organizational priorities for the year ahead.**
 Strongly Agree Agree Disagree Strongly Disagree
- 9. This board communicates its decisions to all those who are affected by them.**
 Strongly Agree Agree Disagree Strongly Disagree
- 10. At least once every two years, our board has a retreat or special session to examine our performance and evaluate how well we are doing as a board.**
 Strongly Agree Agree Disagree Strongly Disagree
- 11. Many of the issues that this board deals with seem to be separate tasks, unrelated to one another.**
 Strongly Agree Agree Disagree Strongly Disagree
- 12. In discussing key issues, it is not unusual for someone on the board to talk about what this organization stands for and how that is related to the matter at hand.**
 Strongly Agree Agree Disagree Strongly Disagree
- 13. Values are seldom discussed explicitly at our board meetings.**
 Strongly Agree Agree Disagree Strongly Disagree
- 14. If our board thinks that an important group or constituency is likely to disagree with an action we are considering, we will make sure we learn how they feel before we actually make the decision.**
 Strongly Agree Agree Disagree Strongly Disagree
- 15. Differences of opinion in board decisions are more often settled by vote than by more discussion.**
 Strongly Agree Agree Disagree Strongly Disagree
- 16. This board delays action until an issue becomes urgent or critical.**
 Strongly Agree Agree Disagree Strongly Disagree
- 17. This board periodically sets aside time to learn more about important issues facing organizations like the one we govern.**
 Strongly Agree Agree Disagree Strongly Disagree
- 18. I can recall an occasion when the board acknowledged its responsibility for an ill-advised decision.**
 Strongly Agree Agree Disagree Strongly Disagree

- 19. This board has formed ad hoc committees or task forces that include staff as well as board members.**
 Strongly Agree Agree Disagree Strongly Disagree
- 20. This board is as attentive to how it reaches conclusions as it is to what is decided.**
 Strongly Agree Agree Disagree Strongly Disagree
- 21. Most people on this board tend to rely on observation and informal discussions to learn about their role and responsibilities.**
 Strongly Agree Agree Disagree Strongly Disagree
- 22. I find it easy to identify the key issues that this board faces.**
 Strongly Agree Agree Disagree Strongly Disagree
- 23. When faced with an important issue, the board often “brainstorms” and tries to generate a whole list of creative approaches or solutions to the problem.**
 Strongly Agree Agree Disagree Strongly Disagree
- 24. When a new member joins this board, we make sure that someone serves as a mentor to help this person learn the ropes.**
 Strongly Agree Agree Disagree Strongly Disagree
- 25. I have been in board meetings where explicit attention was given to the concerns of the community.**
 Strongly Agree Agree Disagree Strongly Disagree
- 26. I have participated in board meetings where explicit attention was given to the concerns of the community.**
 Strongly Agree Agree Disagree Strongly Disagree
- 27. At our board meetings, there is at least as much dialogue among members as there is between members and administrators.**
 Strongly Agree Agree Disagree Strongly Disagree
- 28. When issues come before our board, they are seldom framed in a way that enables members to see the connections between the matter at hand and the organization’s overall strategy.**
 Strongly Agree Agree Disagree Strongly Disagree
- 29. I have participated in discussions with new members about the roles and responsibilities of a board member.**
 Strongly Agree Agree Disagree Strongly Disagree
- 30. This board has made a key decision that I believe to be inconsistent with the mission of this organization.**

- | | Strongly Agree | Agree | Disagree | Strongly Disagree |
|---|----------------|-------|----------|-------------------|
| 31. The leadership of this board typically goes out of its way to make sure that all members have the same information on important issues. | Strongly Agree | Agree | Disagree | Strongly Disagree |
| 32. This board has adopted some explicit goals for itself, distinct from goals it has for the total organization. | Strongly Agree | Agree | Disagree | Strongly Disagree |
| 33. The board periodically requests information on the morale of the professional staff. | Strongly Agree | Agree | Disagree | Strongly Disagree |
| 34. I have participated in board discussions about what we can learn from a mistake we have made. | Strongly Agree | Agree | Disagree | Strongly Disagree |
| 35. Our board meetings tend to focus more on current concerns than on preparing for the future. | Strongly Agree | Agree | Disagree | Strongly Disagree |
| 36. At least once a year, this board asks that the executive director articulate his/her vision for the organization's future and strategies to realize that vision. | Strongly Agree | Agree | Disagree | Strongly Disagree |
| 37. I have been present in board meetings where discussions of the history and mission of the organization were key factors in reaching the conclusion of a problem. | Strongly Agree | Agree | Disagree | Strongly Disagree |
| 38. I have never received feedback on my performance as a member of this board. | Strongly Agree | Agree | Disagree | Strongly Disagree |
| 39. It is apparent from the comments of some of our board members that they do not understand the mission of the organization very well. | Strongly Agree | Agree | Disagree | Strongly Disagree |
| 40. This board has, on occasion, evaded responsibility for some important issue facing the organization. | Strongly Agree | Agree | Disagree | Strongly Disagree |
| 41. Before reaching a decision on important issues, this board usually requests input from persons likely to be affected by the decision. | Strongly Agree | Agree | Disagree | Strongly Disagree |
| 42. There have been occasions where the board itself has acted in ways inconsistent with | | | | |

the organization's deepest values.

Strongly Agree Agree Disagree Strongly Disagree

43. This board relies on the natural emergence of leaders, rather than trying explicitly to cultivate future leaders for the board.

Strongly Agree Agree Disagree Strongly Disagree

44. This board often discusses where the organization should be headed five or more years into the future.

Strongly Agree Agree Disagree Strongly Disagree

45. New members are provided with a detailed explanation of this organization's mission when they join this board.

Strongly Agree Agree Disagree Strongly Disagree

46. This board does not allocate organizational funds for the purpose of board education and development.

Strongly Agree Agree Disagree Strongly Disagree

47. Recommendations from the administration are usually accepted with little questioning in board meetings.

Strongly Agree Agree Disagree Strongly Disagree

48. At times, this board has appeared unaware of the impact its decisions will have within our service community.

Strongly Agree Agree Disagree Strongly Disagree

49. Within the past year, this board has reviewed the organization's strategies for attaining its long-term goals.

Strongly Agree Agree Disagree Strongly Disagree

50. This board reviews the organization's mission at least once every five years.

Strongly Agree Agree Disagree Strongly Disagree

51. This board has conducted an explicit examination of its roles and responsibilities.

Strongly Agree Agree Disagree Strongly Disagree

52. I am able to speak my mind on key issues without fear that I will be ostracized by some members of this board.

Strongly Agree Agree Disagree Strongly Disagree

53. This board tries to avoid issues that are ambiguous and complicated.

Strongly Agree Agree Disagree Strongly Disagree

54. The administration rarely reports to the board on the concerns of those the organization serves.

Strongly Agree Agree Disagree Strongly Disagree

55. I have been in board meetings where the discussion focused on identifying or overcoming the organization’s weaknesses.

Strongly Agree Agree Disagree Strongly Disagree

56. One of the reasons I joined this board was that I believe strongly in the values of this organization.

Strongly Agree Agree Disagree Strongly Disagree

57. This board does not recognize special events in the lives of its members.

Strongly Agree Agree Disagree Strongly Disagree

58. The board discusses events and trends in the larger environment that may present specific opportunities for this organization.

Strongly Agree Agree Disagree Strongly Disagree

59. Former members of this board have participated in special events designed to convey the organization to new members.

Strongly Agree Agree Disagree Strongly Disagree

60. This board provides biographical information that helps members get to know one another better.

Strongly Agree Agree Disagree Strongly Disagree

61. This board seeks information and advice from leaders of other similar organizations.

Strongly Agree Agree Disagree Strongly Disagree

62. This board makes explicit use of the long-range priorities of this organization in dealing with current issues.

Strongly Agree Agree Disagree Strongly Disagree

63. This board understands the norms of the professions working in this organization.

Strongly Agree Agree Disagree Strongly Disagree

64. Members of this board seldom attend social events sponsored by this organization.

Strongly Agree Agree Disagree Strongly Disagree

65. More than half of this board’s time is spent in discussions of issues of importance to the organization’s long-range future.

Strongly Agree Agree Disagree Strongly Disagree

American Cancer Society Volunteer Satisfaction Survey

© AMERICAN CANCER SOCIETY, 1999

PLEASE BASE YOUR RESPONSES ON YOUR COMMUNITY (UNIT)-LEVEL VOLUNTEER ACTIVITIES

1. Have you participated in any type of volunteer activity for the American Cancer Society (ACS) in the past year?

YES, I have volunteered for ACS in the past year

→ Complete Questions #2-17

NO, I have not volunteered for ACS in the past year

→ Complete Question #18

2. Please indicate below the ACS programs/events in which you have participated in the past year, including the specific position or responsibility (if any) you assumed for each activity. While it is not possible to list all of the many ACS programs/events, a few have been provided for your convenience. Please be sure to write in any program or event you do not see on the list.

Program/Event

Position or Responsibility

Advocacy activities

Board/unit board member

Great American Smokeout (GASO)

Man to Man

Reach to Recovery

Relay for Life

Tell-a-Friend

Other (please specify)

3. How would you rate your overall satisfaction as an ACS volunteer in the past year?

Would you say that you have been...*Mark one answer.*

Very satisfied

Somewhat satisfied

Not too satisfied

Not at all satisfied

4. What aspect(s) of your volunteer experience do you like the most (find most enjoyable) and what aspect(s) do you like the least (find least enjoyable)? Please look at the list below and indicate three (3) aspects you like the most in column A and three (3) aspects you like the least in column B. You may indicate “nothing” if appropriate.

	A Like Most	B Like Least
Aspect of Being an ACS Volunteer		
<i>Convenience of schedule/work hours</i>		
<i>Opportunity to use your skills</i>		
<i>Staff support</i>		
<i>Fund-raising/raising money</i>		
<i>Opportunity to be involved in the community</i>		
<i>Working/meeting with other volunteers</i>		
<i>Networking/making business contacts on behalf of ACS</i>		
<i>Helping cancer patients</i>		
<i>Amount of time given to complete a project/task</i>		
<i>Delivering cancer programs to your community that provide awareness, education, and support</i>		
<i>Socializing (with volunteers, staff, patients, etc.)</i>		
<i>Rewards or recognition for your work</i>		
<i>Working with staff</i>		
<i>Challenging nature of the work</i>		
<i>Helping ACS as an organization meet its mission</i>		
<i>Opportunity to make new friends/business contacts</i>		
<i>Other (please specify)</i>		
<i>Nothing</i>		

5. Please indicate the extent to which you agree or disagree with the following statements as they relate to any of your volunteer activities in the past year. *Mark one answer for each.*

As an ACS volunteer, I think it is important to have (although I may not always get)...

• **A complete description of each project/task in terms of scope and expected outcome**

Strongly Agree Agree Disagree Strongly Disagree
Does not pertain to any activity

• **Timely responses from staff to my needs/requests**

Strongly Agree Agree Disagree Strongly Disagree
Does not pertain to any activity

• **An orientation to the overall mission and goals of the ACS**

Strongly Agree Agree Disagree Strongly Disagree
Does not pertain to any activity

• **Direction and guidance in completing projects/tasks**

Strongly Agree Agree Disagree Strongly Disagree
Does not pertain to any activity

• **Input in decisions that are made**

Strongly Agree Agree Disagree Strongly Disagree
Does not pertain to any activity

• **Recognition for my volunteer work**

Strongly Agree Agree Disagree Strongly Disagree
Does not pertain to any activity

• **Training for a particular project/task**

Strongly Agree Agree Disagree Strongly Disagree
Does not pertain to any activity

• **All the materials I need to complete a project/task**

Strongly Agree Agree Disagree Strongly Disagree
Does not pertain to any activity

• **Staff people available when I need them (including their attendance at meetings)**

Strongly Agree Agree Disagree Strongly Disagree
Does not pertain to any activity

• **Clear explanations for changes with ACS that impact me**

Strongly Agree Agree Disagree Strongly Disagree
Does not pertain to any activity

• **Flexibility in how a project/task is completed**

Strongly Agree Agree DisagreeS trongly Disagree
Does not pertain to any activity

- **Opportunities to assume greater leadership responsibilities within ACS**
 Strongly Agree Agree Disagree Strongly Disagree
 Does not pertain to any activity
- **An adequate number of volunteers to complete a task**
 Strongly Agree Agree Disagree Strongly Disagree
 Does not pertain to any activity
- **Flexibility to complete a project/task at a location that is convenient for me (e.g., working at home)**
 Strongly Agree Agree Disagree Strongly Disagree
 Does not pertain to any activity
- **Updates informing me of various volunteer opportunities**
 Strongly Agree Agree Disagree Strongly Disagree
 Does not pertain to any activity
- **Specific projects/tasks matched to my skills**
 Strongly Agree Agree Disagree Strongly Disagree
 Does not pertain to any activity
- **High visibility of ACS in the community**
 Strongly Agree Agree Disagree Strongly Disagree
 Does not pertain to any activity
- **A clear understanding of the respective roles that volunteers and staff play at ACS**
 Strongly Agree Agree Disagree Strongly Disagree
 Does not pertain to any activity
- **An opportunity to work on a variety of projects/tasks**
 Strongly Agree Agree Disagree Strongly Disagree
 Does not pertain to any activity
- **Staff support (staff is willing to do whatever is possible to help me complete a project/task)**
 Strongly Agree Agree Disagree Strongly Disagree
 Does not pertain to any activity
- **Projects/tasks that are personally rewarding or meaningful**
 Strongly Agree Agree Disagree Strongly Disagree
 Does not pertain to any activity
- **Flexibility to complete a project/task at a time that is convenient to my schedule**
 Strongly Agree Agree Disagree Strongly Disagree
 Does not pertain to any activity
- **Staff's ear (staff is willing to listen to me)**
 Strongly Agree Agree Disagree Strongly Disagree
 Does not pertain to any activity
- **Projects/tasks that are making a real difference in my community**
 Strongly Agree Agree Disagree Strongly Disagree

Does not pertain to any activity

- **The opportunity to work with a group of volunteers that represent the ethnic, social, and cultural diversity in my community**

Strongly Agree Agree Disagree Strongly Disagree

Does not pertain to any activity

- **A clear job description of a particular position (e.g., committee chair)**

Strongly Agree Agree Disagree Strongly Disagree

Does not pertain to any activity

6. Please rate ACS on each of the following, based on your experience as an ACS volunteer in the past year. *Mark one answer for each.*

Rate ACS on providing you with:

- **A complete description of each project/task in terms of scope and expected outcome**

Very Good Good Fair Poor

Does not pertain to any activity

- **Timely responses from staff to your needs/requests**

Very Good Good Fair Poor

Does not pertain to any activity

- **An orientation to the overall mission and goals of the ACS**

Very Good Good Fair Poor

Does not pertain to any activity

- **Direction and guidance in completing projects/tasks**

Very Good Good Fair Poor

Does not pertain to any activity

- **The opportunity to give input in decisions that are made**

Very Good Good Fair Poor

Does not pertain to any activity

- **Recognition for your volunteer work**

Very Good Good Fair Poor

Does not pertain to any activity

- **Training for a particular project/task**

Very Good Good Fair Poor

Does not pertain to any activity

- **All the materials you need to complete a project/task**

Very Good Good Fair Poor

Does not pertain to any activity

- **Staff people who are available when you need them (including their attendance at meetings)**

Very Good Good Fair Poor

- Does not pertain to any activity
- **Clear explanations for changes within ACS that impact you**

Very Good	Good	Fair	Poor
-----------	------	------	------

 Does not pertain to any activity
- **Flexibility in how a project/task is completed**

Very Good	Good	Fair	Poor
-----------	------	------	------

 Does not pertain to any activity
- **Opportunities to assume greater leadership responsibilities with ACS**

Very Good	Good	Fair	Poor
-----------	------	------	------

 Does not pertain to any activity
- **An adequate numbers of volunteers to complete a task**

Very Good	Good	Fair	Poor
-----------	------	------	------

 Does not pertain to any activity
- **Flexibility to complete a project/task at a location that is convenient for you (e.g., working at home)**

Very Good	Good	Fair	Poor
-----------	------	------	------

 Does not pertain to any activity
- **Updates informing you of various volunteer opportunities**

Very Good	Good	Fair	Poor
-----------	------	------	------

 Does not pertain to any activity
- **Specific projects/tasks matched to your skills**

Very Good	Good	Fair	Poor
-----------	------	------	------

 Does not pertain to any activity
- **A high visibility of ACS in your community**

Very Good	Good	Fair	Poor
-----------	------	------	------

 Does not pertain to any activity
- **A clear understanding of the respective roles volunteers and staff play at ACS**

Very Good	Good	Fair	Poor
-----------	------	------	------

 Does not pertain to any activity
- **An opportunity to work on a variety of projects/tasks**

Very Good	Good	Fair	Poor
-----------	------	------	------

 Does not pertain to any activity
- **A staff that is supportive (staff is willing to do whatever is possible to help you complete a project/task)**

Very Good	Good	Fair	Poor
-----------	------	------	------

 Does not pertain to any activity
- **Projects/tasks that are personally rewarding or meaningful**

Very Good	Good	Fair	Poor
-----------	------	------	------

 Does not pertain to any activity

- **Flexibility to complete a project/task at a time that is convenient to your schedule**

Very Good	Good	Fair	Poor
-----------	------	------	------

 Does not pertain to any activity

- **A staff that is willing to listen to you**

Very Good	Good	Fair	Poor
-----------	------	------	------

 Does not pertain to any activity

- **Projects/tasks that are making a real difference in your community**

Very Good	Good	Fair	Poor
-----------	------	------	------

 Does not pertain to any activity

- **The opportunity to work with a group of volunteers that represent the ethnic, social, and cultural diversity in your community**

Very Good	Good	Fair	Poor
-----------	------	------	------

 Does not pertain to any activity

- **A clear job description of a particular position (e.g., committee chair)**

Very Good	Good	Fair	Poor
-----------	------	------	------

 Does not pertain to any activity

7. How often, if at all, in the past year have ACS staff or volunteers recognized your volunteer work by way of...*Mark one answer for each.*

- **A “thank you” note or letter**

Often	Sometimes	Rarely	Never
-------	-----------	--------	-------

- **A verbal “thank you”**

Often	Sometimes	Rarely	Never
-------	-----------	--------	-------

- **An award, plaque, or certificate**

Often	Sometimes	Rarely	Never
-------	-----------	--------	-------

- **Naming you in a publication, e.g., a newsletter or local newspaper**

Often	Sometimes	Rarely	Never
-------	-----------	--------	-------

- **A special dinner, luncheon, or other event**

Often	Sometimes	Rarely	Never
-------	-----------	--------	-------

8. How often, if at all, do you think ACS staff or volunteers should recognize your volunteer work by way of...*Mark one answer for each.*

- **A “thank you” note or letter**

Often	Sometimes	Rarely	Never
-------	-----------	--------	-------
- **A verbal “thank you”**

Often	Sometimes	Rarely	Never
-------	-----------	--------	-------
- **An award, plaque, or certificate**

Often	Sometimes	Rarely	Never
-------	-----------	--------	-------
- **Naming you in a publication, e.g., a newsletter or local newspaper**

Often	Sometimes	Rarely	Never
-------	-----------	--------	-------
- **A special dinner, luncheon, or other event**

Often	Sometimes	Rarely	Never
-------	-----------	--------	-------

NOTE: Your responses to the remaining questions will be used to group similar types of people and will not be used to identify you as an individual.

9. Are you currently an active ACS volunteer?

- Yes** **No**

10. Approximately how long have you been an ACS volunteer?

year(s) **months(s)**

11. Which one of the following best describes the type of community in which you volunteer most often?

- Rural** **Suburban** **Urban/metro**

12. Are you:

- A cancer survivor**
 Specify type of cancer
- Someone with a family member or friend who has been diagnosed with
 or died from cancer**
- Neither**

13. Do you currently volunteer for any other non-profit organization in your community?

- Yes** **No**

14. In what age range do you fall?

- | | |
|--------------------------|--------------------|
| Under 21 years | 21-34 years |
| 35-44 years | 45-54 years |
| 55-64 years | 65-74 years |
| 75 years and over | |

15. Which of the following comes closest to describing your ethnic origin?

- African American**
- Caucasian**
- Native American (including Eskimo and Aleut)**
- Asian (including Pacific Islander)**
- Hispanic**
- Other (please specify)**

16. Are you:

- Male**
- Female**

17. In your opinion, what are one or two keys areas that ACS should focus on in order to improve your volunteer experience? Please offer your suggestions for improving volunteer satisfaction below.

Thank You!

Please fold your completed questionnaire and return it (along with your “Request For Summary” form) in the envelope provided.

18. If you answered “No” to question #1, would you like to remain on the ACS volunteer list?

- Yes** **No**

To be removed from the list, Please provide your name and address:

Name _____

Address _____

Please return your questionnaire in the envelope provided. Thank You!

Creating and Evaluating Customer Service

With volunteer systems, it is important to evaluate the effectiveness of the volunteers’ work from the viewpoint of the “customers” who receive the services. Customer feedback helps to measure the organization’s success toward achieving its organizational mission. As well, the feedback can be used to improve the services provided to the customer. Following are ways to create and evaluate customer service.

- Establish a customer-focused organization. Let paid staff and volunteers know how you value your customers and how you define good customer service.
- For paid staff and volunteers who are working directly with customers, hire those people who have competencies in verbal communication and who genuinely like to be around people.
- Train paid staff and volunteers in the specific actions and attitudes that the organization defines as good customer service.

- Change the paradigm of providing services to customers to providing solutions to customers. This will help volunteers to focus on the customer as a person rather than on someone to whom they are giving something.
- Treat your paid staff and volunteers well. The Paradigm study found that volunteers are usually treated by paid staff the same way paid staff are treated by management. As well, volunteers may treat customers the way they are treated. Thus, creating an environment that values and respects all workers - paid staff and volunteers - will create an environment that values and respects customers as well.
- Create a system whereby customers can give regular feedback to the organization (i.e., let customers know how they can do this).
- Listen to customers through surveys (telephone, email or mail), focus groups, site visits, follow-up phone calls or informal meetings. Use these methods to find out how the customers feel about the services provided to them by volunteers. Thus, you will want to know:
 - *The customer's experience with volunteers and the organization in general*
 - *The customer's perception of the quality of the service received*
 - *The timeliness of that service*
 - *The value and need for that service*
 - *Other customer needs that could be met by volunteers*
 - *If there were any problems, how those problems were addressed (or should have been addressed to the customer's satisfaction)*

Use this information to take action to improve the way customer service is provided.

The Generic Steps to Outcome Measurement

The following briefly outlines the steps for conducting outcome evaluations. You may want to refer back to the assessment terms (*see pages 87-88*) to help you with these steps.

1. Determine the key outcomes you need to measure. The outcomes will stem from the goals and objectives of the organization.
2. Determine what indicators will show if you have met those outcomes.
3. Organize the organization's work around meeting those outcomes.
4. Set up procedures to measure those indicators.
5. Organize the information you have gathered in simple, meaningful ways.
6. Report the data to the stakeholders who must know this information.
7. Use the outcome information to improve the work that is being done and to inform the strategic planning process.

There are two excellent guides for developing outcome measurements for volunteer programs: *Focusing on Program Outcomes: A Guide for United Ways*, available from the United Way; and *The Volunteer Center Benchmarking Measure and Program Measure*, by The Points of Light Foundation (*see Bibliography, page 115*).

The background is a solid yellow color with a pattern of thick, white, abstract lines. These lines are irregular and overlapping, creating a complex, web-like structure that covers the entire page.

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