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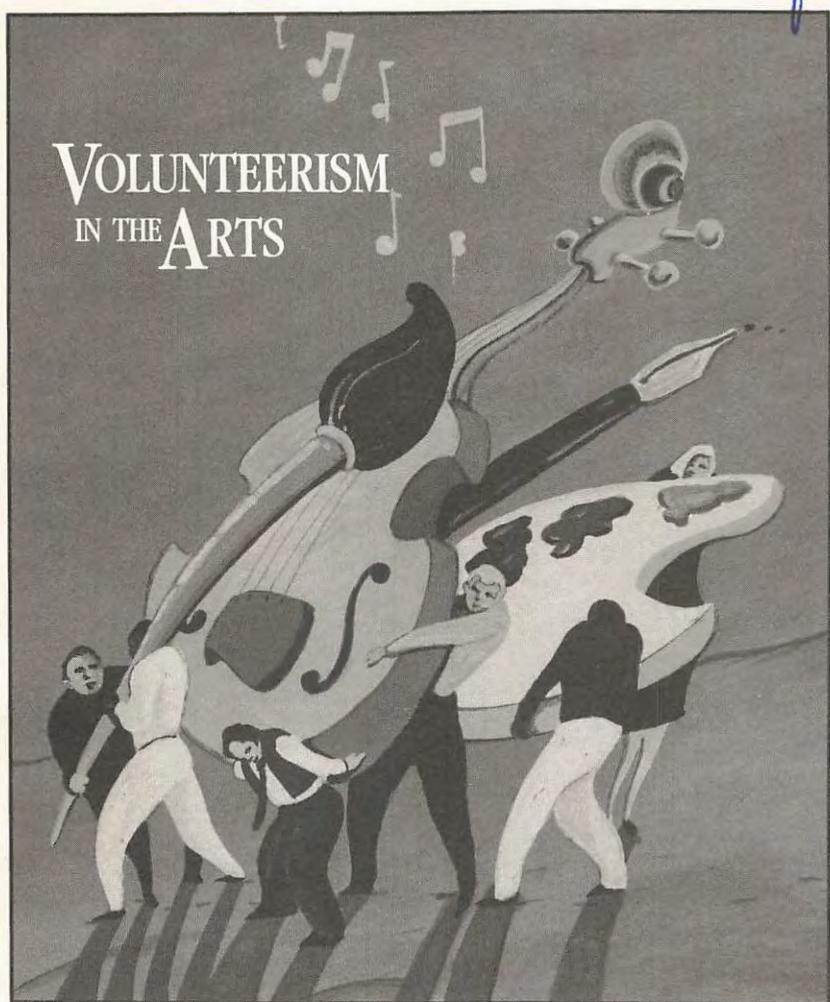
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VOLUNTEERISM IN THE ARTS



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VOLUNTEERISM IN THE ARTS

SUSAN BRAINERD and JOAN KUYPER
Guest Editors

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COMMENTARY

If "learning by doing" is one of life's best educators, then "appreciating by working with" must qualify as one of life's best learning aids. Throughout the course of working on this issue, I have been astounded at the level of energy and insight our guest editors, Susan Brainerd and Joan Kuyper, have brought to this enterprise. They approach their writing and work not only from strong theoretical backgrounds but also from years of experience that have earned them respect in their fields. Thus, they integrate carefully and successfully two of life's strongest learning bases: study and action.

It was quickly apparent to me that the invitation extended to these guest editors was well placed, for at the suggestion of the undertaking, they talked only of the opportunities available in writing about volunteerism in the arts. With amazing speed, they set out to conceptualize how we would approach this issue and what we would try to convey to you, the reader. Everyone knows that arts organizations depend on volunteers to a tremendous extent. What is revealing in this special issue of *The Journal of Arts Management and Law* is the level of devoted

professionalism that now underlies volunteerism in our country.

I do not mean in any way to belittle yesteryear's volunteers by contrast with today's, for what has gone before has created the infrastructure for the level of development we assume today. What I do note is the level of conscious, consistent devotion to finding the best ways to employ volunteers' talents and time. This is best highlighted by the remarks of our roundtable panelists, who brought to their discussion practical wisdom that all artists, trustees, and staff members can apply in their working relationships with volunteers. This is particularly important, since guidance in how to deal with people on the level of *their* motivation, skills, and talents as opposed to *our* needs and exigencies, *our* organizational gaps that need filling, is sadly lacking in much of our formal training.

Such a perspective reminds me of the sound management advice to take a marketing perspective that deals with the need of the customer first, then with the necessities of the business. Tailoring one's approach to the resources of the volunteer—to his or her interests and talent—and then showing respect for those human elements

Commentary

through job descriptions, regular training, consultation, and evaluation will strengthen the volunteer activities of arts organizations more quickly than almost any other management practice. So much of good management is based in the type of common sense found here. Indeed, this special issue has a resounding level of common sense applied day in and day out by its editors, writers, and panelists.

Thus, there is very little theory here that cannot be applied. In fact, the language throughout has an immediacy that connotes action—it exhorts the reader to try it out, use it, test it, and adapt it to his or her own needs. Like dough that invites

the baker to handle and shape it, our contributors' articles and observations challenge us to immerse ourselves in this great area of the "American experiment."

This is the nature of the inviting text you are about to read. By working with Susan Brainerd and Joan Kuyper, I have come to appreciate much more deeply the import of volunteerism in the arts. I cannot thank them enough for giving me this opportunity to grow in appreciation and learning by working with them.

BRANN J. WRY
Executive Editor

Introduction

SUSAN BRAINERD and JOAN KUYPER

Managers of arts organizations are seeking ways to compete successfully for the time and energies of serious volunteers. As we developed this special issue of *The Journal of Arts Management and Law*, we saw cultural volunteering today as a dynamic process similar to an imaginary complex woven tapestry. One view of this tapestry shows us the colorful threads of unlimited opportunities for cultural volunteers.

In this view of the tapestry, volunteers can participate as trustees or commissioners at executive levels, as consultants to help organizations solve special problems, as managers of other volunteers, as project chairmen and committee members, and as support staff. They can serve cul-

Susan Brainerd is director of volunteer services for the New York Philharmonic Society, where she manages the 365-member New York Philharmonic Volunteer Council. She is former executive director of the Federated Arts Council of Richmond, Inc. She served as coordinator for arts education for the state of New Jersey and as coordinator of the arts in education project for the Educational Improvement Center in Princeton. Her recent consulting experience includes projects for the Neopolitan Gallery in Richmond; Virginia Arts for the Handicapped; and the National Committee, Arts for the Handicapped. Joan Kuyper is director of volunteer services, Greater New York Chapter, March of Dimes Birth Defects Foundation. She is former director of the Bergen Museum of Art and Science in Paramus, New Jersey, and former managing director of Teaneck Artists Perform, Teaneck, New Jersey. She has conducted training sessions on various aspects of volunteer management for VOLUNTEER, the National Center; Museums Council of New Jersey; Northeast Museums Council; and the American Symphony Orchestra League.

FIGURE 1.—Volunteer Roles.

		Volunteer Organization Leadership		Program Workers
		Executive Level	Volunteer Organization Leadership	Program Workers
Advocacy	Organize coalitions	Provide testimony Organize advocacy efforts	Write letters Participate in campaigns	
	Serve as city and state commissioners Serve on boards of trustees	Manage volunteer programs Develop procedures Conduct planning for volunteer projects	Provide clerical assistance	
	Raise funds Increase membership and earned income	Chair committees Organize fundraising events Assist in planning membership and subscription campaigns Organize educational and public awareness projects	Serve on committees for fundraising, subscriptions, membership, education, hospitality, and support services	

tural organizations as advocates, policymakers, and fundraisers; in membership development, ticket and subscription sales, educational roles, public awareness and hospitality; and as clerical assistants. The volunteers may have widely varying professions and interests—they may be artists, financial experts, industrialists, homemakers, doctors, lawyers, or civic leaders.

The tapestry becomes more complex when we realize that arts organizations are interdependent in their needs for the skills of trained volunteers. A volunteer might serve as a committee chairman in one organization and simultaneously serve on the boards of others.

A historical perspective on the tapestry of cultural volunteering is provided by Joan Kuyper. Her article shows that the voluntary spirit of citizens in the new American democracy was unique. Founding and supporting museums, symphonies, historical societies, and libraries was necessary for those living in a democracy without the patronage of nobility. This historical view illuminates for arts managers both the democratic and class-conscious values of volunteers established over the centuries, leading ironically, but importantly, to the current social prestige derived from preferred board positions in major cultural organizations.

A close-up view of executive-level volunteers is given by Brann Wry in his article, *The Trustee: The Ultimate Volunteer*. Trustees of private cultural institutions and commissioners of public funding agencies have the ultimate fiduciary and policymaking responsibilities for our cultural institutions. When we realize that all across the United States these trustees and commissioners select the artistic directors and executive managers of our cultural institutions and collectively influence the socio-economic and political climate, we see both extraordinary democracy and power at work.

Effective methods for recruiting and training trustees to orient them to the business of their nonprofit organizations are discussed by both Brann Wry and our experts in the roundtable discussion on cultural volunteers. These articles also address topics such as appropriate insurance and legal advice for trustees, and their responsibilities for overseeing the planning and program management for the service volunteer associations in their organizations.

In our imaginary tapestry, a superior volunteer program is not only dependent upon an exceptional performing or visual arts program but also upon planning and support from the board and senior management. In the present buyers' market for volunteers, with more positions available than volunteers to fill them, arts managers must find ways to motivate volunteers with well-structured volunteer programs and challenging assignments. Attention to the motivation and management of service volunteer programs is given in the roundtable and in articles by Susan

Introduction

Brainerd and Susan Ellis. A study of the New York Philharmonic's Volunteer Council gives in-depth information which demonstrates that, although professionalism has come late to volunteer management in the arts, current practices for recruiting, training, and motivating volunteers are sophisticated and finely tuned to the nature of individual cultural organizations and their respective pools of volunteers. Thus, the New York Philharmonic's Volunteer Council is a model for motivating socially prominent volunteers through a combination of professional employment practices and recognition of their accomplishments by senior management and the board.

Built into this entire dynamic process of cultural volunteering is the ever-present need for evaluation, both to collect information that will inform our future decisions and to recognize properly the specific contributions made by volunteers. Susan Ellis provides both the rationales and techniques for evaluation of volunteer programs in her article, *Evaluation of Volunteer Efforts*.

Throughout this issue, arts managers will encounter essential discussions of staff and volunteer relationships which demonstrate that successful programs are the result of participatory leadership styles that give volunteers a voice in planning and pride in the artistic and cultural contributions of their organizations. It is ultimately clear that volunteers are essential to both the "soul" and the financial success of cultural organizations. They provide a person-to-person two-way communication with the public, and they contribute uncountable millions of dollars in time, energy, good will, and hard work. To reap these rewards, professional management of volunteer activities is necessary for and within the grasp of today's arts managers.

Cultural Volunteer Program History in the United States: Where Does Your Organization Fit?

JOAN KUYPER

Since colonial days, foreign visitors have commented on the extraordinary impulse of Americans to form voluntary groups and invent governmental institutions to serve common purposes. Out of that impulse has come an astonishing variety of American volunteer efforts. . . . Taken together, these efforts constitute a vitally important part of our national life.¹

America's voluntary spirit has produced a variety of cultural organizations that serve many segments of society. These organizations cover all forms of artistic and literary expression—from the traditional to the experimental—and provide educational institutions that teach the public about the arts. The development of the American democratic system has been unique in establishing a society that allows citizens to choose where they will volunteer. Volunteers in the early colonial period organized private cultural associations, but these existed to serve the

Joan Kuyper is the director of volunteer services for the greater New York chapter of the March of Dimes Birth Defects Foundation. She has served as a trainer in cultural volunteerism for VOLUNTEER, Museums Council of New Jersey, Northeast Museums Council, and the American Symphony Orchestra League.

public. This unique community focus in the arts and other democratic institutions directly contrasts with European cultural activity, which was organized about patronage of the nobility, and the church, which supported artistic production for a select group of the upper classes.

Volunteers in the United States have been the key to the vast growth of cultural activity. They have served as workers, patrons, governing board members, performers, chief executives, impresarios, and liaisons to funding and influence. Volunteers have not only been responsible for founding most of the cultural organizations in this country but have worked to ensure their survival. Research into the history of cultural organizations from colonial times has shown that each group began as an idea of a committed volunteer or group of volunteers. It was not until well into the twentieth century that cultural organizations began to utilize professional management.²

FOUR TYPES OF CULTURAL VOLUNTEER PROGRAMS

During the history of cultural voluntary activity in the United States, four distinct types of organizations have emerged: (1) private associations for public trust, (2) social reform organizations, (3) community arts groups, and (4) artist-run organizations. These types are not treated in chronological order but are distinguished primarily by the basic sets of rationales that have motivated volunteers during the history of cultural volunteering. These rationales, in turn, have greatly influenced the organizational structure and style of the particular organizations stemming from them.

Understanding the historical roots and development of each set of rationales will assist modern cultural managers and volunteers to employ volunteers more productively in their own organizations. While some current organizations are structured around one set of rationales, it is more common for each organization's voluntary activity to have characteristics of more than one rationale. Various groups within the organization can be organized about their own rationale. For example, board-level volunteers could be organized as a private association while, at the same time, the staff-support volunteers may work to serve a community need. It is important that today's managers recognize these internal differences within their organizations before planning a volunteer program in order to take advantage of the multiple types of motivation available. It would be counterproductive, for example, to change a successful and unified volunteer program based upon the private association format into a structure based upon social change.

Private Association for Public Trust

The private association for public trust was chosen as the first example to explore because it predated the other types in the United States. This rationale established the structure within which the boards of directors of the major successful cultural institutions function today. The three types that follow evolved in opposition or as alternatives to the first structure. Presenting this model first provides a basis for understanding how and why the other examples developed.

European Beginnings

The private association for public trust can be traced back to colonial times in America and further into the historical setting of Renaissance Europe in the fifteenth century. Volunteers in these organizations also exemplify a family heritage of volunteering that can be compared to the responsibility European noblemen and churchmen felt toward supporting the production of art. In France, this patronage of the nobility was organized by law in 1673 when crafts were mandated under guilds. The artist's status in guilds also affected his place in society.

There also was a very carefully worked out hierarchy among the professions. . . . In Paris, the *six corps*, namely, the haberdashers, drapers, grocers, goldsmiths, money-changers, and furriers, constituted an aristocracy. In matters of middle-class protocol and in processions, quarrels over precedence occurred as frequently and were as bitter as those at the King's chapel between dukes, cardinals, and foreign princes. Moving up a place did not merely satisfy one's vanity, it also was a step up in society.³

The French Guild not only controlled the production of art for the nobility, it provided dependable support for the artist. Most European countries followed this example, except Holland. Here, there had been governmental change brought on by the Dutch Calvinist Reformation. Society was ruled by a wealthy merchant class influenced by puritanic Christianity.⁴ Common man was not ruled by a nobility but by God in both his personal life and his vocation. Calvin explains God's calling.

Lastly, it is to be remarked that the Lord commands every one of us, in all the actions of life, to regard his vocation. . . . Therefore, to prevent universal confusion being produced by our folly and temerity, he has appointed to all their particular duties in different spheres of life. And that no one might rashly transgress the limits prescribed, he has styled such spheres of life "vocation" or "callings." Every individual's line of life, therefore, is, as it were, a post assigned by the Lord, that he may not wander about in uncertainty all his days.⁵

Man was to follow God's dictates in all work in which he participated.

This following of God's law also prescribed that he do good works to better the lives of those less fortunate. Editor John T. McNeill, in an introduction of John Calvin's writings in *On the Christian Faith*, comments on the apparent conflict between taking credit for us and the exercise of good works for the benefit of all.

Strangely, it might seem, this theology that makes so much of the initiative of God and denies all merit to man's works is linked with an ethical doctrine of active and enterprising service to the Church and the human community.⁶

Dutch puritanism strictly influenced art production. Although the artist was free to paint what he wished, the only art actively purchased included portraits of the merchant's family or landscapes to decorate his home. With no guild to support his work, the artist for the first time had to accept outside employment. Dealers began to represent him and sell his work. Art sales were predicated on the conservative nature of the subjects because, under religious law and by community consensus, experimental art was sinful.⁷

American Colonial Associations

In the American colonial period, those who migrated to the colonies came either from a background in which patronage was the responsibility of the nobility or from the free enterprise system of Dutch Calvinism. They also were transported to a new country that was a loose confederation of communities. Because communities frequently existed before governmental structure, a responsibility developed to each other for the good of all. Americans began to think differently about the general society, its government, and the relationship of the individual to each. Daniel J. Boorstin, in *The Decline of Radicalism*, explains the societal change that took place in American voluntarism.

While Europe was everywhere cluttered with obsolete political machinery, in America *purposes* usually preceded machinery. In Europe, it was more usual for the voluntary activities of groups to grow up in the interstices of government agencies. In America, more often the voluntary collaborative activities of members of a community were there first, and it was government that came into the interstices. Thus, while Americans acquired a wholesome respect for the force of the community organized into governments, they tended to feel toward it neither awe, nor reverence, nor terror. . . . Americans tend to think of government as their servant and not their master.⁸

This mix of responsibility for patronage of art, puritanic Christian calling, and the individual's responsibility for community influenced the way the arts developed in America based upon the private association for

Cultural Volunteer Program History in the United States

public trust type. Acceptable cultural activity in America was dominated by Calvinist religious philosophy. It dictated which arts were approved by the public and which were sinful. Cotton Mather (1663–1728) supported the voluntarism of individuals as part of the Protestant “work ethic.” He recognized poverty as a “sin” and expounded upon Christian “calling” as a way to control the evils of society.⁹

Theatre suffered in many colonies as sinful entertainment. The first recorded theatre performance was in Accomac, Virginia (1655). The play, *Ye Bare and Ye Cubb*, so aroused the public that performers were thrown in jail. Similar experiences occurred to actors in other colonies.¹⁰

Literary arts, fine arts, natural history museums, and libraries escaped the prejudice directed toward theatre. Participation in these accepted art forms became the mark of a gentleman of social distinction in colonial America. Benjamin Franklin personified the first American volunteers when he implemented Cotton Mather’s ideological position by founding a large number of charitable and cultural organizations in Philadelphia, including America’s first library (1731), the American Philosophical Society (1743), and the Academy of Philadelphia (1749). The Academy was the first American institution to sponsor social science and natural science research and subsequently became the University of Pennsylvania. Franklin had a fine reputation for his fundraising methods for these causes, and his techniques are still in use by fundraisers to encourage individual philanthropy.¹¹

By the 1750s, participation in charitable and cultural organizations was noted by the community as part of the reputation of a gentleman. Those organizations that were accepted by society as “correct” for volunteering were dictated by the lingering influence of Protestant Christianity. These two arbiters set gentlemen apart from the rest of the population. We see this influence linger today as certain art forms, including literary and museums, are well funded and supported by the upper classes while others, like theatre, continue to be attended predominantly by middle classes and struggle for funding support.

Another crucial structural relationship that began in the colonies and has continued today is the relationship between artists and businessmen on governing boards. The Pennsylvania Academy of Fine Arts was originally founded by a mixed group of artists and businessmen. After frequent quarrels between artists and others on the board along with several reorganizations, a new board structure was formulated. This time the board was composed primarily of leading Philadelphia citizens. The organization became stable, raised sustaining funds, sponsored exhibits, built a permanent collection, and started an art school. Only two artists—Charles Wilson Peale and William Rush—remained on the board.¹²

This management solution—a board composed of very few artists and a majority of leading citizens—became the model for cultural organizations that is followed by many today. Michael Burt, in *Palaces for the People*, comments upon the longevity of the Pennsylvania Academy, which still exists today because it separated the roles of artists and board members at an early point.¹³

. . . [A] board member may not have a knowledge of art, but more important, he must be of a distinguished family or have achieved prominence in political circles to be a board member. Even though he may have differences with difficult artists or have to manufacture an interest in Art, his duty serving a cultural association advanced his personal reputation.¹⁴

The New Republic

After the American Revolution, constitutional freedoms empowered citizens to participate in voluntary activity in a democratic society and gave rise to a new rationale for volunteering—"civic duty" from the dominant Christian "calling" of the colonial period. After several decades of evolution, the Baron de Tocqueville of France visited the United States in 1830 and observed the burgeoning number of voluntary organizations.¹⁵ De Tocqueville wrote that Americans' service to associations strengthened the democratic way of life and the "civic character" of the individual.¹⁶ He remarked upon how Americans cooperated to improve their social condition, express opinions on all sides of an issue, and pressure the government for change or influence of public opinion. The fabric of associations lent purpose to men's lives beyond themselves, attracted individuals to groups to volunteer for a common cause, and allowed opposing viewpoints to be voiced. Prerequisites to the fertile field in which voluntary associations developed were a free press and the right to organize without government restriction.¹⁷

One of the first associations established for the visual arts that clearly fits de Tocqueville's observations was the American Academy in New York, founded by Colonel John Trumbull (1756–1843). This association gathered a documented permanent art collection for exhibition. Its organization used methodology that is still employed by professional curators for collections management in museums. Members were artists and gentlemen of distinction. This private club or association became one of the city's centers of social life.¹⁸

Another example of a cultural type of private association central to the life of the community was the athenaeum, or circulating library. Here, gentlemen came to read and play chess. Some, like the one in Boston, also exhibited art.¹⁹ When the Wadsworth Athenaeum opened in

Hartford in 1844, it contained a Young Men's Institute, a reading room, a Connecticut historical society, and a gallery to display its art collection.²⁰

In New York, the civic-duty rationale for volunteering led to the founding of the Metropolitan Museum of Art. The idea was generated by two private associations that were prominent men's clubs—the Union, founded in 1836, and the Century in 1847. The two associations organized a group of volunteers into a "Committee of Fifty." The group consisted of individuals of equivalent, but not the highest, social standing, including community leaders, businessmen, professionals, politicians, educators, and clergy. Most were descendants of New England families who had made their fortunes before the Civil War. They also were members of city social reform and political associations that opposed the corruptive policies of the current "Boss" Tweed city governmental administration. Most had fine libraries of their own and collected art. The noted orator William Cullen Bryant, a member of the Union, delivered a famous speech in 1863 that opposed the corrupt political influence of "Boss" Tweed. He proposed erecting a museum or "public gallery" where the morality of the people could be elevated by contact with art, collectors could will their art, and artists could study. He concluded that the project would raise the reputation of America in the world community.²¹

The "Committee of Fifty" organized to build the museum under the leadership of John Jay. By 1869, a board was formed; it consisted of an "extremely homogeneous and rather special group" of men of "respectable but seldom prestigious family background."²² The influence of these volunteers and their experiences in clubs on the early structuring of administrative policy for the Metropolitan cannot be discounted. The group of artists and the socially prominent with an appreciation for art possessed the foresight to provide a basic structure that served as a model for all American museums. The Metropolitan was founded to be a true museum, unlike the public galleries of Europe, which exhibited priceless objects for their own value with no educational policy. The foremost objective of the Metropolitan was to be educational. Activities to promote this objective included fine and decorative art exhibitions, loaned exhibits, public education, and lectures.²³ This museum policy is used today by the Internal Revenue Service to judge suitability for not-for-profit status and by the American Association of Museums to assess a museum's worthiness for accreditation.²⁴

The rationales of Protestant work ethic and civic duty were the dominating reasons people volunteered during the colonial period through the Jacksonian era (1492–1836) and on to the end of the Civil War in 1865.

Since most major organizations rely on traditionalism, these rationales are operative today among those who volunteer in them.²⁵

Voluntarism in Private Associations Formats Today

The private associations for public trust today are usually the major cultural organizations around which the upper-class society of a particular city revolves. They attract the community leaders to their boards and are well funded by business and industry, individuals, and government. They have fewer problems recruiting volunteers than other organizations because they are *the* places to be seen. Those who volunteer are usually connected with the power structure of the city and have high income levels.

The volunteer program in such organizations is highly structured and has its own tradition. Sometimes there is a hierarchy of volunteer groups within the organization. For instance, at the top of a symphony orchestra is the society (another name for the board). Other volunteer groups in the organization often include the junior volunteers, the women's committee, and the volunteer council, which encompasses representatives from each volunteer group. The volunteer progresses through various levels of volunteer project management to a position on the volunteer council. After many years' experience, a valued volunteer may be chosen for a board position.²⁶

Boards of these organizations are considered the premiere places to volunteer. Michael Burt, in *Palaces for the People*, explores the history of museums. In his section on the Philadelphia Academy, he notes, "An organization is known not so much by function but by the board it keeps. . . [s]ome cease to function—others keep going because of prestigious boards."²⁷

These organizations are the elite of cultural groups. They attract not only those in positions of authority but those who are in control of the economic and political life of the city. In extending their leadership influence into cultural areas, these individuals are motivated by *noblesse oblige*, the hope for extended power in another arena, feelings of civic obligation, and the recognition that can be gained from influence in another area of the community.²⁸ The volunteers in positions of leadership also may reap hidden or self-interest benefits when they own art or act as a sponsor in an organization that educates the public in the art field; subsequently, their own art collections increase in value.²⁹

Who are these urban elite who wield power in the community? According to E. Digby Baltzell in his book *Philadelphia Gentlemen*, they are conservative and live within their means; they never speak of the cost of their possessions, nor do they mention their net worth. They work

Cultural Volunteer Program History in the United States

long hours and have a great sense of obligation to serve the community. They are "tradition or inner-directed rather than other-directed."³⁰

The world of urban leadership is insulated and dictated by these historical traditions. A set of customs, respect for the group, and a sense of society separate the elite from the majority of the population. The world of the private club, private school, and shared social values dictates acceptable activities of which participation in cultural and charitable organizations is the foremost social arbiter.

Upper-class occupations and areas of interest have included business, law, architecture, museum directorship, publishing, medicine, art collecting, and artist.³¹ Because an occupation in cultural professions seldom allows the person involved to earn a living, successful artists or volunteers for arts organizations traditionally have had to be supported by outside incomes. Baltzell states that in Philadelphia, over 70 percent of upper-class women listed in *Who's Who* gave as their occupation artist, author, or civic worker.³²

The high social level of those involved in cultural management prevented professionalism until the mid-twentieth century. Baltzell claims that the upper classes distrust professionalism and narrow education and favor a wide liberal education in literature and the arts. He states that upper-class ritual and reverence of tradition directly contrast with the ideals of the rest of the population, which has discarded family history and is forward looking, futuristic, and professional.³³ This explains why volunteers in major organizations are unlikely to be impressed by professionals or executives and tend to rely on their own knowledge or education. For the person who has recently achieved upper-class status, the first step to social acceptance is volunteering for cultural and charitable programs. Working on committees and giving donations to such organizations will result in social invitations in higher society and eventual full acceptance.³⁴

Planning a Volunteer Program in a Private Association

Organizing a volunteer program within a cultural agency of long tradition requires a director of volunteers who is a secure professional. Solid research time should be spent planning the program. The manager must be willing to collaborate within the power structure, enabling key volunteers to do the planning rather than allowing his or her ego to dominate the process.

Volunteers from the highest board level should plan volunteer policy and structure the program. In major agencies, broad guidelines are set for the volunteer program. The program supports professional staff but has its own social structure. Roles of both volunteers and staff are clearly

defined and separate. Work is done in the volunteer office, not in staff offices. Because of the connections these high-level volunteers have with city leaders, the volunteer organization tends to have high success and visibility within the community and in the press. Major volunteer programs have waiting lists for positions and do not have to recruit quality volunteers.

When planning a program within a private-association structure, it is counterproductive to attempt to change the strata of society from which volunteers are recruited—the upper classes—and to influx the social system with community people from lower social strata. One of two things will happen as a result. Either the long-term volunteers will gradually become inactive, or the new volunteers will not feel welcome because they will not have the background or financial means to fit into the social structure. This underlines the need for a time of careful evaluation and planning prior to recruitment. The planners must recognize the segments of volunteers they wish to attract and understand the basic organizational structure that will work within the informal social system.³⁵

POPULIST TYPES OF VOLUNTEER PROGRAMS

The next three cultural models—social reform, community arts, and artist-run—are considered populist voluntary movements because they developed in reaction to the private association. (Populist is defined here as involving increased participation by the people.) These organizations were founded to serve the need of the middle and lower classes of society to perform and interact with art. Early organizational planning came from the middle class. Although wealthy philanthropists and other ruling classes are mentioned in this section, it is important to realize that these are self-made men who were not born to wealth but emerged from the middle class.

In his writings, social commentator G. William Dormhoff explains major political movements from the Civil War to the present. To understand the setting in which populist cultural organizations were founded, it is necessary to explore briefly social changes during these periods.

The social reform movement developed during the period after the Civil War when the “civic duty” rationale was changed by the social gospel movement. There was no longer a sharply defined ruling class. In *C. Wright Mills and the Power Elite*, Dormhoff claims that “economic power” was centered in “economic institutions.”³⁶ The ruling class in this period consisted of the wealthy industrialists of the Industrial Revolution. These persons gave their money to charitable and cultural activities to help change the ills of society. The era lasted through either

the New Deal (according to Mills) or the McKinley Administration (according to Reisman).³⁷ The reformist rationale reappeared briefly through the WPA arts projects of the 1930s and the CETA and LEAP Federal Employment Programs of the 1970s.

During the 1930s, "veto" groups or rule by coalitions rather than by unified power groups became commonplace.³⁸ Although the community arts movement began early in the twentieth century, it blossomed in the thirties and again after World War II. Citizens throughout the United States founded community arts councils, community choruses, and community theatres so they could share in cultural activities. The important core of this movement was the empowerment of the average citizen to participate.

The final era Dormhoff discusses is World War II-1970, in which war is the primary concern. Power is shared by corporations, government, and the military. The protest organizations in the cultural community are the artist-run organizations. The artists' cooperatives and artist-run performing companies are centers of protests against war, the problems of society, and traditional art.³⁹ Alternative and nontraditional cultural organizations tend to remain separate from society.

Each of the populist types of cultural organizations—social reform, community arts, and artist-run—will be explored in detail. Each type is considered as a pure form, but the arts manager may find characteristics of each model in many cultural organizations today.

Social Reformist Organizations

The Contributions of Industrialists

The social reformist cultural organization differs from the other models in its primary mission—to address social ills in the community by increasing individual participation in the arts. It may be centered in a social service organization, such as a settlement house, or take the form of a traveling theatre playing to Cajun Mississippi Delta residents. The difference in social reform volunteering is the commitment not only to the specific cultural activity but to the goal of changing problems in society through interaction with the arts.

Historically, social reform began in the era of the major private philanthropists after men from the middle classes made great fortunes during the Industrial Revolution. Andrew Carnegie, who made his money in steel, gave impetus to the reform movement in his celebrated essay, *The Gospel of Wealth* (1889), in which he disputed the heretofore-existing philosophy of giving time and money as a "religious duty" and called philanthropy a "social obligation." Carnegie felt that he had been chosen to

collect wealth and use it to benefit "the public interest." He researched charities and gave to those he felt to be the most deserving; notable gifts were to free public libraries for "building and equipment." In turn, the townships in which these libraries were located donated land and maintained the property. Through this method, he founded 1,946 libraries in the United States and 816 in the United Kingdom and Canada.⁴⁰

John D. Rockefeller was motivated by a combination of religious duty, evangelical reform, and democratic responsibility. Between 1889 and 1937, he gave 10 percent of his earnings to religious causes, the Y.M.C.A., and the University of Chicago. Contributions during his lifetime totaled \$531 million.⁴¹

During this era, there was a great upsurge in public education for all. Civic leaders supported schools and libraries for everyone. These institutions became the centers for social life in the community. Volunteerism changed its rationale into a "fusion of the reform objectives of political liberals with the spirit and rhetoric of Protestant Evangelicalism."⁴²

Religious fervor seized the nation. Organizations such as the Women's Christian Temperance Union lobbied against the abuse of alcohol and other corruptive elements thought to bring about the ills of society.

The change from "civic duty" to "social reform" as a rationale for volunteering was based upon the tenet that the individual volunteer was elevated ethically and the nation was transformed spiritually.⁴³ By participation, the innate amoral character of the person was suppressed and his Christian character strengthened. Today, this justification is used by the Moral Majority and other evangelical organizations.⁴⁴

Always tempered by a Democratic idealism, religious rationales never separated from the system to cause radical social change. A popular belief during the late nineteenth—early twentieth centuries was that volunteering was the price paid for living in a free society. This democratic principle led wealthy philanthropists to give generously of their time and money to charitable causes.

At first, these wealthy individuals *were* the volunteers. They decided who should receive their donations and managed all the funds. The industrialists soon became overwhelmed by the administration of their wealth and placed it in foundations to be distributed by professional staff (Carnegie in 1911 and Rockefeller in 1913). The foundations gave millions of dollars to charities in the form of grants.⁴⁵

The foundation movement and the political atmosphere for social reform changed charitable giving from being the domain of the wealthy upper class to that of the middle-class industrial wealth. Philanthropy no

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longer consisted mainly of private one-to-one donations, but it became public and provided broader community participation in cultural activity.

The Ford Foundation took an even greater role in promoting regionalization and local participation during the community arts movement of the 1950s.⁴⁶ Its funding of regional theatre, dance, and other activities allowed these art forms for the first time to put down roots and expand in local communities.

America owes a great debt not only to the upper classes but also to the wealthy industrialists of the social reform era. Without the vision of these early volunteers, we would have no major arts institutions.

Women's Cultural Reform Contributions

In the 1890s—early twentieth century, it was acceptable for men of the upper and middle classes to participate in political and reform associations as volunteers. Their wives and daughters, however, were not welcome in these associations. Thus, women volunteered for charitable and cultural organizations.⁴⁷

In such organizations, upper-class women found a means of recognition and a way of maintaining their social status. In *The Higher Circles: The Governing Class in America*, Dormhoff claims that women of the upper class are “fashion leaders, patrons of culture, directors of social welfare, and the sustainers of the upper class as a social class.”⁴⁸ He goes on to say that they support the social institutions that maintain the society, set “social and cultural standards for the rest of the population,” and establish our “involvement in welfare movements” to better the general society.⁴⁹ They soften the business-oriented views of their husbands.

Mary Harriman, daughter of wealthy railroad millionaire and philanthropist E. H. Harriman, decided to form an organization of “debutantes for community work.” She and several others formed the Junior League for the Promotion of Settlement Movements in 1901 and chose the College Settlement House on Rivington Street in New York’s Lower East Side as their first project. In March 1902, the League’s first annual report stated that the art committee had taught classes on “drawing, designing, and modeling,” and the music committee had begun a music school.⁵⁰

The League utilized cultural activities to brighten the lives of the poor in settlement houses. They used their connections as arbiters of social need to document working conditions of the lower classes and to change laws through the power and influence of their husbands and fathers. By the turn of the century, there were many college-educated women who had time to volunteer. Their experience in gathering social data and bringing the results of their research to their husbands who had the power to make changes in government and industry was crucial.⁵¹

These early experiences of the Junior League teaching cultural programs at Rivington House Settlement were not as successful as had been hoped. The women soon realized that their backgrounds and education were lacking in the field of social work. They began to attend lectures by Jane Addams, founder of Hull House in Chicago, and John Dewey at the New School of Social Philanthropy (later the New School for Social Research).

These Junior League Settlement projects were the first documented evidence of voluntary art and cultural activity used as social reform. League programs later expanded into other settlements, hospitals, and health care associations.⁵²

Dormhoff comments on the role of settlement houses and the role of women. He notes that women of the upper classes live in a "world apart from those without wealth."⁵³ He goes on to say that "settlement houses provided meaningful work for idealistic scions in their late teens and early twenties and for concerned young adults who wanted to do something significant with their considerable education." The settlement houses also served as "hope for leaders and other levels of the population" and as a "meeting ground for leaders in upper and working classes."⁵⁴ This period marked the beginning of social work as a profession. Dormhoff claims that social work is a "middle-class profession created by members of the upper class."⁵⁵

In the 1920s, the settlement house movement became less popular with the League and its volunteers. They found the problems too great for their resources. They moved to "Carnegie libraries, playgrounds, city museums."⁵⁶ (Further contributions of the Junior League will be discussed under The Community Arts Organization.)

Adult Education as a Rationale for Volunteering

John Dewey, the inspiration for League social programs, was important in the social reform movement throughout the twentieth century. The social reformists now had three rationales for volunteering—civic duty, evangelical Christian responsibility, and adult education. Between 1910 and 1930, Dewey combined these three rationales as essential in developing the political character of citizens and educating them to volunteer in public activities. Those who were pluralists also felt that participation in voluntary activity resulted in a broad sharing of political power by "a wide range of independent organizations."⁵⁷

Dewey felt that participation in cultural, religious, and social organizations required ethical and moral judgments.⁵⁸ He theorized that joint participation in voluntary activity produces "consequences" that are different from those resulting from isolated behavior. These conse-

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quences affect publics beyond those persons immediately participating in the decisionmaking, often resulting in a change in conditions.⁵⁹ Dewey justified participation in voluntary associations as a necessary part of adult education.

After feminists of the 1970s criticized volunteering as unpaid work, the adult education rationale was utilized in place of other rationales to recruit volunteers. The adult education appeal to women centered on volunteering for re-entry to the job market, learning new skills, or changing jobs. Today, the appeal of this rationale is how the volunteer himself can develop through volunteering.

Federally Funded Social Reform

Two other periods in the twentieth century can be linked to the social reform cultural movement. The first is the WPA arts projects of the 1930s; the second is the Federal Employment Programs of the Great Society—CETA and LEAP—of the 1960s and 1970s, respectively.

These programs differ from those of earlier social reform eras because government funding entered the social reform arena. Until Roosevelt's New Deal Administration of the 1930s, funding for charity and cultural activities had come from private sources. Now government provided money for the employment of artists.

The Work Progress Administration (WPA) was approved by Congress in 1935. Although funding for cultural programs did not nearly equal that of social programs, many creative forms flourished as never before. Public visual art as well as theatrical and literary work of considerable significance were created by WPA projects in communities throughout the United States.

Volunteers played a vital role in the success of WPA. In order for a community to be eligible for sponsorship of a WPA project, sponsoring organizations had to prove that they had volunteer support. Voluntary boards of peers were set up to judge the suitability of candidates for arts projects, and the quality of work produced was high.⁶⁰

Participation in WPA projects gave artists both a dependable living and a freedom to experiment with their work that they had never experienced. Many examples of public art stand today as monuments to the success of WPA. Over 10,000 drawings, paintings, and sculpted works were produced, and many public buildings (especially post offices) were decorated with murals. Theatres presented highly praised productions, and there were an average of 4,000 musical performances per month. A writers' project produced a series of guidebooks to geographic areas in all states that is utilized by travelers today.

Volunteers became concerned when the government threatened to

cut off WPA funding at the end of 1939. Some WPA work became political and anti-government in tone, especially drama. The United States Congress became alarmed by the content of plays; it charged that production costs were too high, that commercial theatres were given too much competition by government funding for theatre, and that the productions had blacks and whites on stage together.⁶¹ Congress voted arts projects out of WPA funding, even though the action was protested by such voluntary organizations as the Advertising Club of New York, the Junior League, Business and Professional Women's Clubs, National Arts Club, settlement houses, Town Hall Club, many private social agencies, and labor and civic organizations.⁶²

Volunteers became advocates for cultural activity, a new social reform role. The political tide was against their success at this time; at a later time, however, volunteers had more impact lobbying the government to continue arts funding.

Federal programs similar to WPA were developed during the Great Society years of the late 1960s and the 1970s. Some CETA and LEAP programs were social change projects in which cultural organizations became involved. Many new cultural organizations were formed in response to these programs. These groups were staffed with office support personnel and performing artists paid by the federal programs. Other community arts organizations used the programs for full-time office people to replace a rapidly dwindling core of volunteers. When one person's funding ran out, he or she was replaced by another CETA or LEAP person rather than the organization raising funds to support the staff position. When CETA and LEAP were discontinued by Congress in the early 1980s, many community arts organizations had to cut back their programs. Some programs ended because they failed to attract volunteer support and funding from the community to maintain their operations.

Although large-scale federal funding can free the artist to create and experiment, the voluntary support system must first be in place to ensure continuity and community support. In other words, government support is weak without a volunteer structure.⁶³

Social Reform Distinction

The social reform cultural type differs from the other organizational types in its philosophy that the production of art is equal or in some cases secondary to the social change it is expected to produce. This organizational type is primarily targeted to relieve unemployment, educational inadequacy, and cultural insufficiency in the lower and middle classes. It generally appears in times of economic stress. Within the organization, people exhibit high commitment to and are brought together by the

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social cause. This is different from volunteers in the other types of organizations who donate their time for reasons of civic duty or to be involved in the production of art.

Volunteers are attracted to social reform organizations because of their commitment to change the ills of society. Today, the organizations closest to the pure social reform models are those of artists against nuclear war.

The Community Arts Organization

The community arts organization is the most prevalent populist model of cultural activity in the United States. It sprang from the desire of town leaders to bring the best educational and cultural activity to their towns.

In the history of various rationales for volunteering and the resultant cultural movements, inspiration often began fifty or more years before the explosion of the idea. For example, the ideas of Dewey and Elizabeth Hull in the 1880s resulted in social work as a profession in the 1930s. Sometimes rationales are revived as society and economics change the voluntary movement in different historical periods. Also, popular movements and rationales overlap in the same eras, with different people volunteering for a variety of reasons.

The community arts model is an example of development over decades. Its beginning can be traced to the Lyceum period (1826–1939) when township leaders established a system of public schools. Public libraries proliferated around the turn of the century as a result of funding from Rockefeller and Astor. Libraries continue to sponsor cultural programs today.

The Chautauqua movement (1874–1925) was the first recorded pure community arts movement. Funded by wealthy industrialists, it blossomed to a total of 12,000 participating towns by 1924. Originating as an artist's colony in New York state, the movement sponsored performances, literary readings, and circuit theatre. Local community leaders recruited volunteer support groups for the activities. Although the quality of performance was not always dependable, ordinary citizens had the opportunity to volunteer and interact with artists in their own towns.⁶⁴

The Chautauqua movement "changed the attitudes of rural America."⁶⁵ From this time forward, the populist movement was associated with the community or grass roots, which denotes both its origins and source of support. Here, everyone could sing or play or paint, including those without arts training. Community arts were viewed as amateur, while arts in the major cities became thought of as professional.

Established cultural institutions tended to be located in the urban industrial centers on the East and West coasts. Artists generally flock to urban

areas because of their diversity and the existence of major institutions. The rural areas in mid-America thus have had difficulty sustaining the major institutions or artistic quality found in cities. Artistic preference therefore has been city over rural, coastal over heartland, and urban artists over rural artists.⁶⁶ The community arts movement has suffered from this feeling that its quality is viewed as inferior, and difficulties in obtaining funding also have resulted.

Community Arts Characteristics

In *The Community Arts Council Movement*, Nina Gibans claims that until the 1920s "community arts" was not a distinct term. Rather, organizations were referred to as "community symphony . . . community theatre . . . or community chorus."⁶⁷ These organizations were formed by volunteers who wanted to participate in amateur arts activities. The conductor or artistic administrator might be paid, but everyone else was a volunteer. These organizations began in the early twentieth century and served a white middle- or upper-middle-class public.⁶⁸

Such organizations were characterized by their grass roots quality, local or neighborhood audiences, and the opportunity for the average person to participate. Most groups were concerned first of all with the performance; little time was taken with planning or establishing organizational structure. Organizations were operated out of living rooms, rented space, or borrowed offices.⁶⁹

Following its settlement house and social work experiences, the Junior League of America entered the cultural community arts movement. It became the foremost presenting organization for children's theatre and actively fostered urban historic preservation. The League's planning and coordination systems learned from social agencies became the format for community arts councils throughout the United States.⁷⁰

Virginia Lee Comer of the National Junior League staff (now the Association of Junior Leagues) worked with the network of local volunteer community leagues to organize cultural activities. She noted in her landmark study, *The Arts and Our Town*, that community arts organizations often do not understand the inner workings of their locality. This is true of artists, educators, and both the professional and volunteer managers of the organizations.

The artist also is unable to assess the community, make an educated evaluation of its resources, and be effective within community parameters. Comer says that artists frequently do not possess the ability to market their products and achieve public visibility. She contends that success in the arts is dependent upon a symbiotic relationship between the community and the professional artist within the cultural organiza-

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tion. Inferior communication and poor understanding of how the arts relate to the community result in failed programs and friction between artists and the organizations.

Comer's study also noted that individual arts agencies often exist in vacuums that they create themselves. She contends that interaction between cultural groups in the community is vital not only for artistic growth but for sharing technical skills and resources such as financing, program planning, audience development, and public education. She concludes that future professional arts administrators should have the skill to analyze community resources and "understand their professional relationship to it [the community]." The professional should be able to pass on to the volunteer his or her organizational skills and techniques for planning the long-term development of the organization.⁷¹

Despite over thirty years of progress since Virginia Lee Comer articulated many innate problems of community arts organizational management, some of these problems still exist today. In a 1980 study, the National Endowment for the Arts listed the following.

. . . a too narrow funding base; regular cash flow crisis; insufficient money for fundraising, staff, promotion, or audience development; a board without fundraising skills or access to funding sources; underpaid artists and overworked administrative staff; and a rudimentary financial system that hinders cost control and planning.⁷²

Given the numerous problems of community arts agencies, it is a miracle that they continue to survive. Some are able to enlist a committed group of volunteers and organize them effectively enough to continue to perform their services. Community cultural organizations often have limited paid staff; thus, volunteers perform all services including board, staff, and artistic functions. Volunteers may serve multiple roles, and problems can arise if they become confused at any one time as to which role they are playing. For instance, the board member of a museum who also serves as curator of the art exhibit is part of the ruling body of the organization. Problems may develop when he is wearing his board-member "hat" while doing staff work under the paid director. The administration, board, and executive director must work to define separate roles and responsibilities for staff and volunteers to avoid overlap of duties and resulting friction. The model for volunteers in community organizations involves volunteers serving in staff positions rather than in separate membership organizations. This is necessary because lack of funding results in few staff to carry on operational activity.⁷³

In *The Community Arts Council Movement*, Nina Gibans discusses how strong leadership roles and responsibilities must be structured. She

suggests locating volunteer board members who will give priority to the whole organization's work, not just to individual projects. Board roles can be written in job-description form so potential candidates will understand the commitment and responsibility a board appointment entails. A position as volunteer does not always involve financial support. Sometimes it means giving time on committees and working for the organization. In organizations where there are only a few paid employees, dependable and committed volunteers are vital. The test of organizational survival is transference of the spirit of voluntary commitment to the next generation.⁷⁴

Artist-Run Organizations

After World War II, populist cultural organizations grew and multiplied. These new organizations were more closely tied to the artist and the creation of art than the previous models. In *The Emerging Arts*, Joan Jeffri defines this new type of organization as

. . . highly individualized, small, local groups . . . that sought to provide alternatives to both the profit and not-for-profit worlds—groups that compose what I call the needs of their artists with flexibility and inventiveness, and the not-so-distant past . . . [l]eaders tenaciously pursued their goals against tremendous odds—they were unknown, they often did nontraditional work, and they had little support and less money. Nevertheless, they persevered.⁷⁵

Off-off Broadway theatres were an example of this movement. Directors and artists collaborated out of artistic need. Those who had founded the organizations created a family-like atmosphere, contributed time and money, and helped the actors and crew make ends meet by dipping into ticket receipts. Actors' Equity and other unions did not levy full dues on members who worked in these theatres. Performances were held in a variety of unconventional spaces, including lofts and churches. Jeffri claims that this movement had a long heritage, with its roots in the past.

Their predecessors can be found in Salon de Refuses of the mid 1800s, the Armory Show of 1913, in Off-Broadway and regional theatre, in cooperative galleries of the 1950s, on New York's Tenth Street, and in independent pioneers like Ruth St. Denis, Ted Shawn, and Martha Graham—people and places committed to providing alternatives for the creation and production of work.⁷⁶

These groups were largely supported by volunteers and were rooted in an individual artistic style. They resisted outside influences that could have any impact upon their artistic and creative freedom. When founda-

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tions and the government offered badly needed money, some chose to close their doors rather than compromise their principles to meet the standards required by these agencies.⁷⁷

Another emerging group in the 1960s and early 1970s was the Women's Movement. During its peak, women began their own performing groups, galleries, literary magazines, and other organizations. The voluntary sector was changed as feminist organizations attacked the use of volunteers as an exploitation of women.⁷⁸ The National Organization of Women held its fifth national conference in 1971 during which a landmark report was delivered by its Task Force on Voluntarism. In the report, two types of volunteering were differentiated. "Traditional or service-oriented" volunteerism was characterized as a detriment to the status of women. In contrast, "political or change-oriented" volunteering was said to empower women, leading them into positions of decision-making on social, political, and economic issues. The latter was highly favored in the report.⁷⁹ As a result, many women resigned as volunteers.

Managing a volunteer program in an artist-run organization requires a commitment to the artist or the individual artistic style. Individual artists often do not tend to be interested in organizational business. The volunteer structure that seems to work best in such organizations is that of a separate social group. Administrative work is handled by volunteers with an advisory committee of artists serving as the artistic voice. This structure relieves artists of administrative duties and allows them time to create art. Some organizations also carefully recruit artists who are trained in administration to serve on boards so the artists' viewpoints are heard in organizational policymaking.⁸⁰

Although they are among the most creative and future-oriented arts organizations, too often critics fail to take artist-run galleries seriously and avoid reviewing them. In the performing arts as well, artist-run organizations tend to be the most experimental and avant garde. Such groups have difficulty attracting traditional sources of money for support. In short, artist-run organizations are characterized by difficulty of funding, a small public audience, experimental artistic creation, and internal competition.⁸¹

Artist-run organizations have frequently been on the cutting edge of social commentary. During the 1960s, street theatre was utilized to protest the Viet Nam War. One of the most recent examples of artists' protest groups is seen in the organizations of artists against nuclear war. Throughout history, artists have sensed impending political change, protested against the ruling classes, and presented performances to raise the consciousness of the masses. Their social commentary has not been popular with traditional organizations or the establishment. Artist-run organiza-

tions, therefore, have had difficulty attracting community volunteers and traditional sources of funding. Theirs is a struggle for survival.⁸²

CONCLUSION

Where do your organization and its volunteers fit in these historical types? Many highly trained administrators of cultural programs fail to function within their organizations because of a lack of understanding, both of these informal rationales, goals, and values, and of traditional ways the business of the organization has been carried on successfully by its volunteers. Organizations are governed by perception, and many times the executive fails to recognize these informal bases of power. It is not that professionals are not qualified in their management skills, but that too often the "people factor" was not a part of their training. Looking at why the volunteer is giving time and trying to serve that inner need for recognition can help the manager to promote more effectively the functioning of the organization. Likewise, it is counterproductive to try to change the basic set of informal rules by which the volunteers function without support from organizational leadership. A private association cannot be changed overnight to a community arts organization. Recognizing these unwritten rationales concerning why groups and individuals volunteer will not always solve day-to-day problems, but it will help the manager observe his or her volunteers as distinct people with goals, values, and talents—all of which are needed by the organization to succeed today.

NOTES

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20. Burt, *Palaces for the people*, 45-46.
21. Ibid., 91.
22. Ibid., 88-89.
23. Ibid., 92. The Metropolitan, though founded upon the principle of serving the public in 1870, did not open its doors to the general public until 1891 (as documented by McTuade, W. Management problems enter the picture of art museums. *Fortune*, July 1974).
24. See Accreditation guidelines of the Museum Assessment Program, American Association of Museums, Washington, D.C.
25. Greenberg, E. M. 1982. *New partnerships: Higher education and the nonprofit sector*. San Francisco: Jossey-Bass, Inc., 25-26. Many of the ideas concerning rationales for volunteering in this article are taken from this source.
26. The commentary in this section on volunteers organized as private associations today came from personal observation and research.
27. Burt, *Palaces for the people*, 137.
28. Jaher, F. C. 1982. *The urban establishment: Upper strata in Boston*. New York: The Macmillan Company, 52-58.
29. Ibid., 234.
30. Baltzell, E. D. 1958. *Philadelphia gentlemen, the making of a national upper class*. New York: The MacMillan Company, 52-58.
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55. *Ibid.*
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57. Greenberg, *New partnerships*, 26.
58. *Ibid.*, 161.
59. Dewey, J. 1934. *The public and its problems*. Denver: Sivalloin Press, 26-27.
60. Howard, D. S. 1973. *The W.P.A. and federal relief policy*. New York: Da Capo Press, 138-39.
61. *Ibid.*, 236-39.
62. *The Congressional Record*, June 28, 1939, 8099-8102.
63. Author's personal observations and experience.
64. Bakal, *Charity U.S.A.*, 26-28.
65. *Ibid.*
66. Mulcahy, K., and C. R. Swaim. 1982. *Public policy and the arts*. Boulder: Westview Press, 19.
67. Gibans, *The community arts council movement*, 27.
68. *Ibid.*
69. *Ibid.*
70. *Ibid.*, 70.
71. *Ibid.*, 22 (several previous paragraphs are paraphrased from the National Junior League study by Comer, V. L. 1944. *The arts and our town*.).
72. National Endowment for the Arts, Pilot program announcement, Institutional advancement grants, fiscal year 1980. Washington, D.C.: National Endowment for the Arts, 2.
73. Author's personal observations and experience.
74. Gibans, *The community arts council movement*, 209.
75. Jeffri, J. 1980. *The emerging arts: Management survival and growth*. New York: Praeger, 2.
76. *Ibid.*, 3.
77. *Ibid.*, 43.
78. Greenberg, *New partnerships*, 26.
79. *Ibid.*, 73.
80. Author's personal observations and experience.
81. Burnham, S. 1973. *The art crowd*. New York: David McKay Co. General information about the art market was taken from the source. The conclusion was based on this author's personal observations.
82. Author's personal observations and experience.

The Trustee: The Ultimate Volunteer

BRANN J. WRY

The nonprofit tax-exempt corporation is unique to the United States of America and has evolved over many years to meet the needs of our nation's charitable endeavors. This evolution has not been easy for arts organizations, since they typically reflect an immeasurable amount of human energy attempting to promote artistic vision while still working within the standards established by state and federal laws for corporate practice.

At the heart of arts organizations, artists find themselves "in business." Being there, they are subject to all the developments of law and business practice in the nonprofit corporate sector. This gives rise to a number of realities artists must deal with in order to institutionalize their work and gain broad community support for it. Artists must learn to navigate in the environment of nonprofit corporations, which continually rely upon volunteers, to assure their work reaches the public.

The sometimes complex nonprofit corporate milieu demands an intrepid person who is the creation of lawmakers, the helpmate of artists, and the helmsman of the arts organization. Enter the trustee—a volun-

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teer who has identified with the activities of an arts organization and decided to give time, thought, work, and frequently personal fortune to support the artistic endeavor. This article will address some of the concerns that face trustees in fulfilling their voluntarily assumed responsibilities to lead, manage, and regenerate arts institutions.

I call this person the "ultimate volunteer" for three reasons. First, the trustee of a nonprofit tax-exempt arts organization is the final referent for business decisions made by the corporation. Second, the trustee commits himself to keeping the mission of the endeavor alive and relevant to current societal needs. Third, the trustee sets the tone and ambience for the whole organization.

In all these areas, the trustee fulfills two roles—decisionmaker and leader. These are management roles the trustee assumes upon joining the arts endeavor. Recruitment and orientation should clearly stress these functions to new trustees; ongoing trustee evaluation should reaffirm them for those continuing.

It is well established that trustees are responsible for the management of a nonprofit corporation.¹ The trustee is the usual incorporator of the fledgling business, even though the artist gives that undertaking its meaning and principal work. Boards of trustees direct the finances of the organization, hire chief executives, plan and evaluate budgets, and account to the public for what the corporation is doing. An invitation to join a nonprofit arts institution's board carries with it the knowledge that the work involved will demand time, energy, and expertise, for the hurdles of trusteeship are easily the match of the accomplishments.

Trustees are an important operational arm of nonprofit organizations.² They differ from the ordinary corporate director because of their heightened involvement with administration. Nonprofit trustees are strategically located between the business affairs of an endeavor and the community needs of the public. It is hyperbole to say that they are the voice of the community, but in a real sense they are the community's link to the artistic business of the endeavor. Their guidance of the undertaking reflects to some degree the corporation's community base. More important, however, the quality of that guidance can make or break artistic goals.

Even though trustees frequently function as an organization's operational arm, they exist primarily as evaluators and controllers of the arts organization's progress. The "purpose of having trustees with specific expertise is not to encourage encroachment on day-to-day activities that are the staff's responsibility but to provide a monitoring capability for the board."³ Evaluating the arts endeavor may be the least noted of trustee duties, but it is the most important and difficult, for too frequently in any business, management focuses on reaching short-term objectives.

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Jonathan Cook of the Support Center in Washington, D.C., uses a helpful schema⁴ to delineate between board and staff functions—between evaluation and control on the one hand and operating on the other. Its substance is included in Table 1 as an aid to analyzing a board's fulfillment of its trustee responsibilities.

The activities on the left delineate the duties of trustees. As an organization matures, trustees do less of the administrative work in the second column and more of the governance activity on the left. If this is not the case, the organization may experience turbulence arising from a confusion of functions and displacement of efforts. Volunteers and staff face the challenge of dividing, assigning, and monitoring responsibility as the business grows.

In sharing the management of an arts business, trustees and staff should note that in this century, as opposed to last, there is much greater sensitivity to the weight of responsibility one assumes—both in the trustee's perception and the public's view. Living in a litigious era has increased the perceived burden of trusteeship. Developments in management expertise and technological support also contribute to the necessity for today's volunteer to approach trusteeship with a heightened sense of professionalism. The past twenty years' developments in arts governance have built an illusory contradiction into the system: the volunteer trustee must become more professional at his "spare-time" cultural activity. While many volunteers are professional at trusteeship, the apparent contradiction raises concerns for the selection, orientation, training, and output of the volunteer trustee.

TABLE 1.—Board and Staff Functions.

Board Functions	Staff Functions
Governing	Managing
Advising	Strategizing
Advocating	Marketing
Authorizing	Publicizing
Developing trustees	Training
Hiring/firing CEO and artistic director	Hiring/firing supervising staff
Planning	Preparing plans, budgets, etc.
Funding	Fundraising
Evaluation and control	Informing the board
Accounting to public	Preparing reports

Too often, voluntary governance work is viewed as a nonbusiness activity, a spare-time pursuit that does not come to the level of gravity or immediacy attributed to one's livelihood activity. Overtones of pleasure, prestige, and public service imputed to trusteeship should not overshadow the very real fact that an artist who has institutionalized his or her work in the nonprofit tax-exempt system has called upon trustees to work intently in a business whose product is art. It is no less serious an undertaking than any other business activity, even though it may be more interesting and enjoyable.

The trustee, along with artistic leadership, also has the ultimate responsibility for keeping the mission of the organization alive and well. The embodiment of that mission is certainly in the artistic work of the organization, but its characterization, planning, and care fall within the range of trustee responsibilities. Trustees' work includes hiring the artistic director, finding the right chief executive officer to work with the artists, and planning to meet changing times. A volunteer joining an arts organization's board will have to plot strategy as well as give advice, espouse mission as well as formulate it, and reflect organizational energy as well as absorb it.

It is ultimately the trustee to whom artists, staff, and volunteers look for the tone and quality of the organization. Admittedly the artist sets the creative pace and describes the vision for artistic product, but his or her business partners include managers, trustees, and service volunteers. Since people constitute organizations, it is common to look to final decisionmakers for the integrity and determination needed to give the organization its ongoing sense of purpose. What is needed are very determined individuals who believe in the shared vision of the organization and will *voluntarily* give time and resources to achieve it.

Alexis de Tocqueville marveled at Americans' energy for getting neighbors involved in worthwhile projects. This energy has continued throughout the present century, and there is no reason to think it will abate appreciably in the future.

Trustee's Relationship to Mission

When one ponders what will fire peoples' imaginations and move them to do great things, one is searching for an essential ideal characterized by planners as the "mission" of an endeavor. The mission is that overall purpose for which the organization was founded. The mission statement articulates the authentic heart of the organization and attracts volunteers and staff to the undertaking on a basis of shared ideals and social beliefs.

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I like to think of trustees as "guardians of the constitution" (or mission), a concept I first noted in the late E. F. Schumacher's *Small is Beautiful*.⁵ There is a dynamism here, despite the romantic overtones, that places the trustee directly at the nexus of the organization's vision and its realization for society. This characterization also implies the value one associates with mission—i.e., its power to bind the endeavor together philosophically. The actual mission of the organization is its treasure, its constitutional hermeneutic, something worth volunteering for.

A trustee should be passionate for the organization's purposes. A kind of trusteeship, or invitation to it, that says one has to do very little to fulfill his or her responsibility is unacceptable. A guardian is as vigilant and nurturing as a parent and brings to this volunteer effort discretion and discipline in reviewing intended plans, programs, budgets, and campaigns.

Even so, there is a tremendous range in the number of hours trustees spend working for their organizations. That range depends to a great extent on the identification with the organization's mission and the use of trustees' skills. "Studies have shown that the range of trustee activity goes from two hours per month to one hundred hours per month. . . . In the study of the Episcopalian Social Services, it was found that the average active board member spent about ten to fifteen hours per month on the organization; others spent merely two to four hours monthly, at the board meeting."⁶ Clearly there is no eleemosynary endeavor that does not have its share of doers and fellow travelers. Thus, it is most important that any arts organization search for individuals who understand, appreciate, and support its mission, for that is the forging bond from which the quality of all trustee action flows.

Selection of Trustees

Finding the ultimate volunteer—a person who has time coupled with belief—is not an easy task. Identifying the right trustee involves many hours of searching, accompanied in many cases by hours spent in explanation and persuasion. The stereotypical "search" based on an assumption that a potential volunteer "would make a fine contribution" simply will not suffice in this age of heightened sensitivity.

Thus, every board of trustees must establish a nominating committee charged with a year-round recruitment effort.⁷ Many authors make this recommendation, since a nominating committee is concerned with more than naming individuals to the board. Its primary responsibility is regeneration of the board to fulfill present plans by recruiting and training skilled human resources.

From the viewpoints of motivation, experience, and understanding, the busiest trustees should be those assigned to recruitment, for they are the most apt to reflect accurately and espouse effectively the organization's mission. They are likely to find people like themselves who identify with the corporation's purpose. Their heightened involvement also indicates that they care enough about the organization to want to see it prosper even after their own tenures. Finally, their high level of activity puts them in a position to evaluate the strengths and weaknesses among the trustees and discern where new trustees would best fit. In this light, the nominating committee serves as the board development committee.⁸ It is the keystone committee, for it deals with the generation of the organization's most important resource: ultimate volunteers.

A year-round, ongoing board development effort involves a number of tasks. First, the committee must approach trustee positions as any firm approaches its personnel function. It should regularly plot and correlate the strengths of its board members. In doing this, the committee must take a functional approach to assessing the organization's needs. An organization needs planning, financial direction, budget control, fundraising, and the like, in order to function in the business world. Therefore, the nominating committee must address how these functions will be fulfilled through people. Frequently too much energy is displaced into efforts to find the right person at the wrong time or at the last moment.

It is standard management practice to address the question of personnel by using a system of job descriptions that describes the type of skilled people needed to fulfill the functions necessary to operate a business. Unfortunately this is not a standard practice among boards of trustees.

As a process, board regeneration should work backward from mission, to long- and short-term objectives, to skills needed to fulfill those objectives, to trustee job descriptions, to people in the community who are likely to identify strongly with the organization's mission and are able to fulfill those descriptions. With this as part of the nominating committee's workflow, a very different approach to board development from that typically used by many arts organizations would develop. Volunteers would become likely candidates for trusteeship on the basis of what they know or can do, not necessarily on the basis of who they know or the scope of their personal financial resources. The latter become favorable factors instead of overriding considerations. As factors only, they open the recruitment discussion to people who are likely to achieve organizational objectives because their strengths are tapped.

Taking a job description approach to recruitment is preferable to a semi-contractual approach, which some boards have adopted in recent

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years. A job description approach directs the nominating committee's attention to the skills needed to fulfill short- and long-term objectives. Having a potential trustee sign an agreement has more to do with binding persons to an organization than with getting work done. A thorough board development process should overcome the need to make a trustee sign a contract.

Authors Conrad and Glenn take trustee development a needed step further when they suggest a recruitment process that delineates strongly between recruitment and orientation.⁹ Recruitment is the process after skills identification, job description, and people identification when a delegate from the arts organization goes into the community to convince prospective trustees that the organization has a worthwhile mission and goals, is viable and exciting to work with, and will enhance the volunteers' range of activities. At this point, the delegate from the organization must be a persuasive salesman. He or she is making no commitment to nominate but is testing for match and interest. Should any prospective trustees be interested in making a commitment, they then go on to the orientation process. The recruitment phase acquaints the volunteers with the organization, while the orientation phase tells them how the organization does what it does.¹⁰ After prospective trustees have been through both phases, they are ready for a commitment to the organization. Equally important, the arts organization is ready to commit to them.

Admittedly, such a process demands discipline on the part of the nominating committee and the board. It means that much preliminary time is spent in the board's personnel function, in searching for the right people, and in teaching them through meetings with officers and chief staff how the organization works. The yield in deployable new trustee activity, however, is potentially enormous.

Training

Following the orientation process, assuming a commitment is made and the new volunteer is elected to trusteeship, the nominating committee, chair, trustees, and chief staff know enough about the new trustee to make a correct committee assignment. Because of initial training, the new trustee is ready to function as an informed member of the board. The selection and training efforts have yielded the reward of placing a qualified ultimate volunteer *ready* to work.

In the present era of increased corporate sensitivity, this effort becomes a crucial element in fulfilling trustee responsibility. Trustees shudder at the thought of court action to review trustee activity, but such scrutiny is not unknown. In *Stern v. Lucy Webb Hayes Training School for Deaconesses and Missionaries* (the "Sibley Hospital" case), the

United States District Court in Washington, D.C., after making a thorough review of standards for trustee action in light of some haphazard handling of the hospital's investments by trustees for many years, required "present and future" trustees for five years following the opinion to read the court's opinion and certify, by written memorandum or notation in the board's minutes, that they had done so.¹¹ In fact, the court exhibited a deep "task orientation," for it specified that the opinion should be read "within two weeks" of its rendering or of the time a new trustee came on board.¹² The Sibley Hospital case admittedly deals with grave accusations of trustee negligence and conflict of interest in handling hospital funds. It bears reading, however, because it represents a situation where a court has actually instructed a board of trustees on orientation with respect to handling its organization's funds. Through reading the case, a new Sibley trustee should get an eye-opening view of the hospital's financial management history.

Stern serves as a good illustration of society's awareness that trustees should be trained to the job. Trustees' responsibility to train themselves constitutes only part of the ultimate volunteer's duties. An answerability to all volunteers of an organization stems from trusteeship. Trustees should recognize this responsibility more readily because they, too, are volunteers.

A board of trustees should carefully review every aspect of volunteer activity to see where communication can be improved, support of volunteers can be increased, insurance coverage for volunteers' actions on behalf of the corporation may be necessary, and recognition is warranted and due. Ultimate volunteers must realize from their own contributions that the efforts of the organization will stumble without adequate liaison between themselves and other volunteers. In addition, trustees should seek advice of counsel on the legal relationship the organization has with its volunteers so that questions of liability and indemnity coverage will be addressed in favor of the volunteer. It is particularly important that trustees regularly monitor the quality and progress of volunteer operations, since service volunteers are so frequently closely aligned with delivery of the arts organization's services.

Legal Status of the Trustee

Today's trustee is rightly concerned about potential consequences of assuming volunteer management responsibility in the arts. In most states, the trustee is like any director of a corporation,¹³ except that in the nonprofit tax-exempt setting, this director has no equity interest and frequently governs an organization that has considerably fewer resources than it needs.¹⁴ As to standard of care, however, in fulfilling respon-

sibilities to the organization and public, the corporate director is held to exercising ordinary and reasonable care in the performance of duties.¹⁵ If directors are held to the "ordinary care" standard, whether in banking,¹⁶ in hospitals,¹⁷ or in arts organizations,¹⁸ one must question why there is currently such frenzied concern among directors and trustees over assuming governance positions.

Need for Indemnification of Trustees

Because of the weight of responsibility of trusteeship and the potential expense trustees may incur in defending their decisions and actions, it is important to find some way to indemnify trustees for their actions taken in good faith and with reasonable care. In view of a history and climate that favor citizens' assuming public responsibility, it is ironic that it has become increasingly difficult to insure companies and directors against their own actions. "Director and Officer" (D&O) insurance has increased in cost as much as tenfold in some cases between 1985 and 1986.¹⁹ Available indemnification insurance may not nearly cover a director's potential loss, so potential directors are avoiding board membership. In the words of one for-profit director, "I talked to my counsel, and he said that the odds against my being sued were probably 70–30, but I had to decide whether it was worth that risk of losing my fortune. I'm 68 years old, and it wouldn't be easy for me to make a new fortune."²⁰ Nonprofit trustees are not involved in the same type of corporate decisions that give rise to so much of the litigation in this area—e.g., corporate takeovers—but in many cases trustees have the same achievement profiles as the corporate director. Cultural organizations and for-profit corporations are drawing on the same pool of qualified personnel, and that pool fears the expense connected with litigation, even though no liability may ever be assessed.

Indemnification of trustees should be a practice of any board if it is to hold their allegiance. One must always inquire, however, as to the scope of indemnifiable acts, the circumstances giving rise to indemnification, and the limit a board may place on it. A state incorporation statute may allow or require indemnification but still require a determination by one's board that the asserted indemnifiable action meets the appropriate standard of care.²¹ Prosecuting one's rights beyond an unfavorable board determination would be an added expense for an unindemnified trustee.²² Actually, the most worrisome factor in the area of potential liability is the expense of defense more than the assessment of liability and damages against trustees, for there are few instances where liability has been assessed against corporate directors.²³

Basic Considerations for Volunteer Trustees

In facing these concerns, arts trustees should consider three environmental factors: (1) the incorporation laws of their organization's state (many have laws specifically dealing with nonprofit incorporation),²⁴ which may have controlling sections on standard of care for a nonprofit trustee and indemnification of trustees; (2) the wording of their organization's corporate charter, by-laws, and recorded resolutions; and (3) the availability of indemnification insurance for nonprofit trustees in their state. By thoroughly checking these three areas, the voluntary trustee can make a better assessment of action necessary to minimize his or her exposure to claims.

For example, in the state of New Jersey, which passed a Nonprofit Incorporation Act in 1983,²⁵ trustees are told to "discharge their duties in good faith and with that degree of diligence, care, and skill which ordinarily prudent persons would exercise under similar circumstances in like positions."²⁶ Thus, one can see that a trustee in this state (as in many others) is held to a standard of ordinary care. New Jersey's section 15A N.J.S.A.:6-14 goes on to specify,

In discharging their duties, trustees and members of any committee designated by the board shall not be liable if, acting in good faith, they rely on opinion of counsel for the corporation or upon written reports setting forth financial data concerning the corporation and prepared by an independent public accountant or certified public accountant or firm of accountants or upon financial statements, books of account, or reports of the corporation represented to them to be correct by the president, the officer of the corporation having charge of its books of account, or the person presiding at a meeting of the board.

Since the element of good faith is almost always present in voluntary trustee action, following this standard would help trustees to jump the first hurdle—standard of care. The Nonprofit Law Revision Committee note on this section indicates that the New Jersey Legislature followed common law and New Jersey's own for-profit incorporation statute section found at 14A:6-14.²⁷ In a state that has not adopted a nonprofit incorporation statute, standard of care for trustees may be covered in the for-profit incorporation act.

Once trustees are aware of the standard of care required in a state, they should ascertain what actions may give rise to liabilities. This information is also available in statute and case law. Corporate statutes frequently have extensive sections on this subject, almost a catalog of sins and transgressions. This examination should be made in light of what the state incorporation law says regarding indemnification of trustees,

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specifically whether the state law mandates indemnification of the trustee or simply allows it.²⁸

The next step is examination of the arts organization's working documents—the corporate charter, by-laws, and minutes—to assay whether any of these states that the board may or will provide indemnification of a trustee. It is better for any trustee that the organization's stated policy be one of indemnification. Here too, however, statute may intervene to allow indemnification only when it has been determined that a trustee or other corporate agent has acted in good faith. If there has been any negligence or misconduct—determined by a court, for example—a trustee may be denied indemnification unless on application a court determines that he or she is entitled to indemnity.²⁹

A board of trustees should make these deliberations with advice of counsel since they require reading statutes, perhaps some case law, and available insurance coverages. The assessment will affect the well being of the organization's volunteer efforts for years to come. In the present climate, a thorough investigation may yield the benefit of much more satisfactory recruitment efforts, for it should give the nominating committee a statement of the board practice in the area of indemnification in light of state law and available insurance.

Obtaining Insurance

Finally, locating D&O coverage may be the most difficult part of the process. Here, corporate management is put to the test of finding a policy that covers as many areas of trustee action as possible for the smallest possible insurance premium. The price of such coverage affects smaller arts organizations most. Fortunately, arts trustees have not succumbed to a state of paralysis, but they have learned that added to their management burden is the necessity for painstaking review of the insurance market's available indemnification policies.

Without coverage, a defendant trustee might receive no more than defense costs and attorney's fees.³⁰ Marc Lane states that it is difficult to assess what the price of D&O insurance coverage should be since there is little experience in the field, very little actuarial data on nonprofit trustees' liability, and uncertain trends due to changes at the state legislative level.³¹ Since there is very little exposure for nonprofits compared to for-profits, one might think that their coverage would be much less expensive.³²

Indemnification is most difficult for the board of trustees, for it is fraught with uncertainty and change. The best trustees can do at this point is to examine carefully statutes, case law, indemnification coverage, and finances available to cover indemnity insurance. Structurally, a board would do well to have a subcommittee deal with the questions of

board liability and indemnification, making certain that the insurance coverage purchased is as comprehensive as possible and that board indemnification practice conforms to applicable statutory and case law.

Even though they confront these issues, voluntary trustees must not reduce trusteeship to the elements of standard of care, liability, and indemnification, for trusteeship brings with it satisfactions in making meaningful contributions to society. It must be this that de Tocqueville noticed when he saw Americans who, fastening upon something that needed doing, went from neighbor to neighbor arousing interest and catalyzing action.

CONCLUSION

The challenge of becoming an ultimate volunteer lies in nurturing an artistic ideal with authority, discipline, and the kind of caring that makes love tangible in public works. Though the human condition frequently demands recognition for what one does, there is still the counsel of scripture that reinforces the wellspring of voluntary trusteeship: "How poor those who work for a reward."³³

Trusteeship calls upon the highest instincts one has for the sake of contributing what he or she can do for an arts organization without customary rewards. The ultimate volunteer gives time without receiving money in return; gives advice that does not always force action; gives money that does not underwrite totally; gives him or herself for little or no applause.

He or she does this because of the rewards of giving of oneself to make this a better world. Helping to realize artistic missions that improve mankind's understanding places the risks of trusteeship in a different light. While there are risks, there also are methods for trustees to employ to assure themselves of outstanding future human resources for their boards.

Ultimate volunteers must make time to identify, recruit, orient, and train themselves and their replacements in such a way as to improve the overall quality of voluntary participation in the arts endeavor. Trustees' heightened responses to their commitment can then serve as the model for all the volunteers of the arts organization. In this context, the mission gains effective guardians at every level.

NOTES

1. See Weber, J. 1975. *Managing the board of directors*. New York: The Greater New York Fund, for a succinct discussion of trustee responsibility.

2. Unterman, I., and R. M. Davis. 1984. *Strategic management of not-for-profit organizations*. New York: Praeger, 12.

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3. Wolf, T. 1984. *The nonprofit organization, an operating manual*. Englewood Cliffs: Prentice-Hall, 33.
4. Cook, J. 1985. Support Center Seminar Materials. Washington, DC: The Support Center.
5. Schumacher, E. F. 1973. *Small is beautiful*. New York: Harper & Row, 281.
6. Unterman and Davis, *Strategic management*, 12.
7. See, e.g., Crawford, R. W., editor. 1981. *In art we trust*. New York: FEDAPT, 9.
8. See Conrad, W. R., Jr., and W. E. Glenn. 1983. *The effective voluntary board of directors*. Athens, OH: Swallow Press, Ohio University Press.
9. Ibid., 128 ff.
10. Ibid., 148.
11. STERN v. LUCY WEBB HAYES NATIONAL TRAINING SCHOOL FOR DEACONESESSES AND MISSIONARIES, 381 F. Supp. 1003, 1021 (1974).
12. *Id.*
13. *Id.*, 1013.
14. Cf. Unterman and Davis, *Strategic management*, 12 ff., contrasting for-profit and nonprofit directors.
15. BEARD v. ACHENBACH MEM. HOSPITAL ASS'N., 170 F.2d. 859, 862 (10th Cir. 1948).
16. See BRIGGS v. SPAULDING, 142 U.S. 662 (U.S. 1891), for one of the earliest statements of this standard where the Court allowed considerable indulgence to two new bank directors who were not at all well acquainted with their bank's investments. The Court noted the earlier directors' taking no interest in the bank's investments for fourteen years prior to the bank's failure but said that the new directors, Spaulding and Johnson, did not have to ask for a sweeping review of the bank's books in the first ninety days of their tenure in order to fulfill the standard of care.
17. STERN, *supra* note 11.
18. Cf. Marsh, G. H. 1981. Governance of nonprofit organizations: An appropriate standard of conduct for trustees of museums and other cultural institutions. 85 DICKINSON L. REV. 607; 1983. *The Journal of Arts Management and Law*, 13:32, for an extensive discussion of standard of care.
19. Lewin, T. March 7, 1986. Director insurance drying up. *The New York Times*, D-1.
20. Ibid., D-4.
21. Lane, M. J. 1980. *Legal handbook for nonprofit organizations*. New York: AMARCOM, 94.
22. Ibid.
23. See Professor Noyes E. Leech's comments at the Paris Colloquium on Corporate Governance, March 10 and 11, 1983, reported in 6 JOURNAL OF COMP. BUS. AND CAP. MARKET LAW (1984), 199, 263: "Nevertheless, I think it can be fairly said that the duty of care cases that have gone to judgment against directors [of for-profit corporations in the U.S.A.] and officers and have been affirmed at the appellate court level are relatively small in number."
24. Cf. The public spirited defendant and others: Liability of directors and officers of not-for-profit corporations. 17 J. MAR. L. REV., 665 ff.
25. N.J.S.A. 15A:1-1, et. seq.
26. N.J.S.A. 15A:6-14.
27. N.J.S.A. 15A:6-14, at 156.
28. E.g., New Jersey allows indemnification in an elaborate prescriptive framework set out at N.J.S.A. 15A:3-4. This section also grants the corporate power to purchase and maintain insurance on behalf of any corporate agent at N.J.S.A. 15A:3-4(i). See, too, FLETCHER CYC. CORP. #1085 and 6045 ff. for a survey of state statutes on the subject.
29. Cf. N.J.S.A. 15A:3-4(c).
30. Lane, *Legal handbook*, 95.
31. Ibid., 109.
32. Ibid.
33. *Bhagavad-Gita*, Chapter 2, vs. 49.

Creating an Organizational Climate to Motivate Volunteers

SUSAN BRAINERD

INTRODUCTION

Staff and volunteers from other performing arts organizations in New York City frequently ask why the New York Philharmonic Volunteer Council (NYPVC) is so successful. They want to know how they might develop equally successful volunteer groups to serve their organizations. These managers of volunteers seem particularly interested in attracting and keeping daytime volunteers with leadership abilities—those very competent, highly motivated, often socially prominent women who can take charge of gala fundraising projects.

Their questions have led to this examination of the structure and inner workings of the NYPVC in the context of organizational theory. While the Philharmonic has attracted strong volunteer fundraisers for many years, its current management and NYPVC leadership have created a democratic organization of four hundred members who annually conduct more than twenty educational, public relations, and fund-raising projects.

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The effectiveness of this organization would not surprise the leaders of major museum volunteer programs or some major symphony managers across the country who have a history of highly organized volunteer programs. Many other performing arts organizations, however, have not been able to develop such highly structured and effective volunteer programs.

History of the Philharmonic Council

Founded in 1842, the New York Philharmonic has a long tradition of active volunteers. Prior to 1980, the Auxiliary Board of 120 women, the Junior Committee of sixty, and The (Men's) Committee were the major volunteer groups. With expanded programming in the 1960s and 1970s, such as the Radiothon (annual telephone-radio fundraiser) and the Free Parks Concerts, new volunteers were attracted. Recognizing the need to reorganize and focus the energies of a growing number of highly competent volunteers, the Philharmonic's managing director, a board member who also was a volunteer leader, and leaders from each of the three existing volunteer groups formed an ad-hoc committee and met several times over the period of a year to evaluate existing efforts and formulate the following recommendations:

1. That the existing separate groups dissolve and become part of one new service organization, the "Council," which would operate as a department of the Philharmonic and not as a separate organization;
2. That the Philharmonic create a full-time staff position for a director of volunteer services to act as business manager and liaison between the volunteers and the symphony management; and
3. That the membership requirements for the new "Council" consist of a commitment to be an active volunteer worker in at least one ongoing activity and a minimum \$15 donation to become a member of the Philharmonic Symphony Society.

In order to participate in the formation of the new "Council," the existing volunteer groups voted to dissolve their organizations and follow the recommendations of the ad-hoc committee.

A PROFESSIONAL APPROACH TO EMPLOYING VOLUNTEERS

In 1982, soon after the NYPVC was formed, Elizabeth Peck, the new director of volunteer services, wrote an article for the Theatre Com-

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munications Group's *Performing Arts Ideabooks* called Employing Volunteers: A Professional Approach at the New York Philharmonic.¹ In this case study, Peck described how the organizational and communications structure, the membership process, and the working procedures of the NYPVC encourage volunteers to feel that, while they are unpaid, they are accomplishing important tasks in a professional manner.

Peck felt that the following aspects of the organizational structure of the NYPVC contributed to this professional approach: (1) leadership structure; (2) program focus; (3) membership process; and (4) communication among the volunteers and staff. Each of these will be discussed below.

Leadership Structure

The leadership structure of the NYPVC is similar to that of other membership organizations. The following officers are elected for one-year terms by the membership of the council:

1. *Council Chairman*—reports to the Philharmonic managing director;
2. *First Vice Chairman*—in training to become chairman;
3. *Vice Chairmen*—each of five vice chairmen oversees four or five project chairmen (see following section on program focus); and
4. *Secretary*—prepares minutes of Executive and Steering Committee meetings; accomplishes other tasks as assigned by the chairman.

The vice chairmen and secretary report to the NYPVC chairman and, with him or her, are responsible for the daily management of the Council's programs (see following section). They work closely with each other, their volunteer project chairmen, and the director of volunteer services in the office several days a week. They meet together informally each week to solve problems and are part of the formal Executive Committee, which meets once a month. The Executive Committee also includes the managing director, immediate past chairman, past chairman, and board advisor (appointed by the board). The formal reporting systems are illustrated in Figure 1.

Program Focus

The volunteer programs of the NYPVC are organized into four program areas: fundraising, public awareness, service to the orchestra and management, and volunteer operations. Specific projects under each area are shown in Table 1.²

FIGURE 1.—Volunteer Council of the New York Philharmonic.

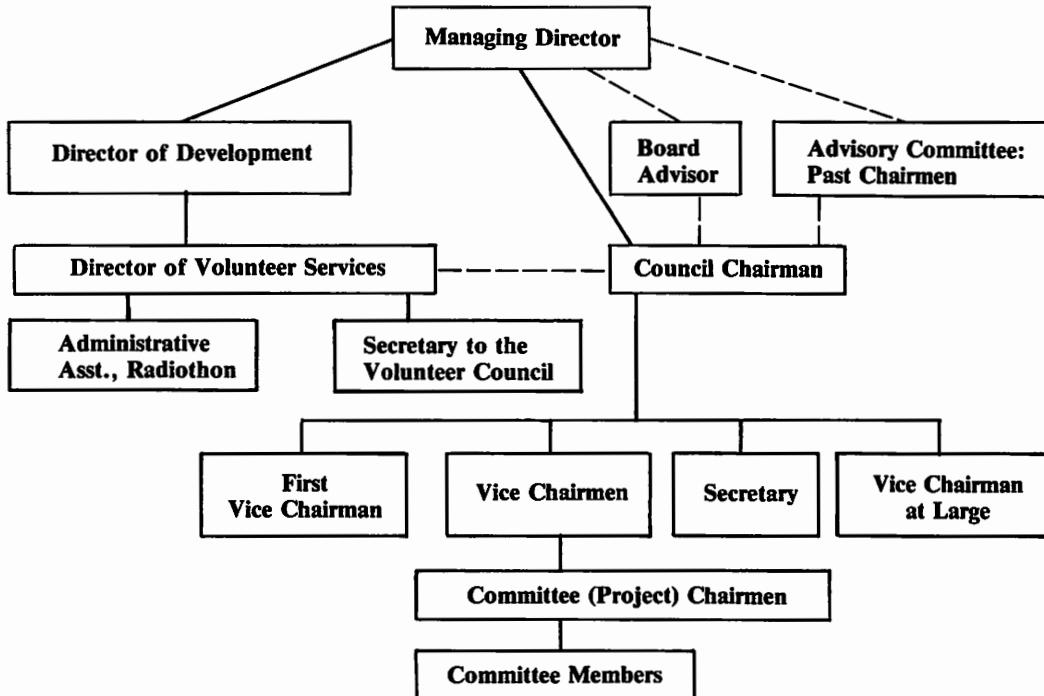


TABLE 1.—NYPVC Program Areas.

Fundraising	Public awareness	Service to the orchestra and management	Volunteer operations
Annual luncheon	Arts advocate	ASOL activities	Council luncheons
Holiday gala	Audience development	Orchestra coffee breaks	Evening volunteers
Opening night	Educational affiliates	Orchestra luncheon	Membership
Philharmonic Ball	Friends coffee bar	Staff assistance	Newsletter
Metropolitan Committee	NYP Ensembles		Research/
Philharmonic Gift Shop	"You Gotta Have Park"		resources
Radiothon			
Parks concerts			

Each project is managed by a volunteer chairman appointed by the Council chairman, who also assigns each vice chairman to oversee four or five project chairmen. Each project chairman selects his/her committee, which includes new members as well as those who have previously worked on the project and want to continue. Each project chairman is given a job description outlining the overall goals and responsibilities of the project and a detailed final report from the preceding chairman. Vice chairmen and project chairmen also are given a chairman's manual that describes Philharmonic and office procedures and some performance expectations.

Chairmen generally have been working members of committees they are asked to chair; thus, they bring direct experience with them when they begin a new project. New project chairmen have a planning session with the NYPVC chairman, the vice chairman overseeing their project, the director of volunteer services, and other support people as needed.

The project chairmen and the Executive Committee form the Steering Committee, which also meets once a month. At this meeting, the project chairmen report on projects, participate in management training, and receive information on upcoming Philharmonic events and issues.

In the introduction to Peck's article, editor Bruce Phariss points out that the Philharmonic gives its volunteers "substantive work" and focused tasks for which "a specific goal or purpose is articulated." Thus, he says, a "volunteer seldom feels frustrated or as if he or she were wasting time—an important point when time is valued so highly."³

Membership Process

The NYPVC membership process is actually a personnel employment process that includes recruitment, interviewing, placement, training, supervision, recordkeeping, and evaluation. Recruitment is informal because Council members individually seek out people they feel can make a contribution and enjoy participating in the Council's work. Other prospective volunteers request membership information because they have seen or heard about the work of the NYPVC.

Prospective volunteers are sent a booklet describing the Council's structure and programs and a membership application form. When the application is returned, the volunteer membership chairman schedules an interview for each person seeking membership. The interviewers, who may be one or two Council officers and/or members of the Membership Committee, provide more information to the prospective volunteer and ascertain his/her interest in actively working on one or more of the Council's programs.

If the applicant's time availability and interests match the needs of the Council, he or she is invited to become a member and is recommended to the appropriate project chairman who introduces the particular project activities. If the Council's and prospective volunteer's mutual interests do not match for a year-round commitment, the volunteer may wish to give a small amount of time for special projects such as the Radiothon or Free Parks Concerts.

Two or three times a year, the NYPVC holds an orientation for new members during which the Council chairman and managing director welcome them and acquaint them with the overall mission and structure of the New York Philharmonic. The new volunteers are introduced to the senior staff who direct the departments and are given a tour of Avery Fisher Hall.

Project chairmen are responsible for training the new volunteers to participate in their projects. This training may consist of an individual discussion of the project activities and/or a group skill-development session (for example, learning to operate the Gift Shop).

Each volunteer has an ongoing membership record card showing the projects in which he or she has participated each year since becoming a member. Project chairmen and their advising vice chairmen are responsible for informally evaluating the continuing interest and ability of each volunteer to meet the particular needs of each project. Each of these endeavors is evaluated annually by a wrap-up meeting of participants, and final reports are prepared by the project chairmen and director of volunteer services.

Communication Channels

Internal Communication

Much of the communication between volunteer leaders about daily activities they are managing takes place through informal discussion in the office and weekly operational meetings of the officers. More formal channels include

1. Monthly Executive and Steering Committee meetings;
2. Semi-annual luncheons to offer the entire membership an opportunity to hear reports on the projects and have a social time;
3. The Volunteer Council newsletter, which is sent to the entire membership and the orchestra, board, and staff three times a year; and
4. A membership directory, which is published bi-annually.

Utilizing these channels of internal communication and working closely with the director of volunteer services, the Council chairman is responsible for facilitating communication and working relationships among the volunteers.

Volunteer-Staff Communication

The Philharmonic's managing director places a very high value on the contributions of the NYPVC and frequently praises and recognizes its work. He is available when needed for consultation with the Council chairman and the director of volunteer services, thus communicating his support for the professional quality of the volunteer activities.

The key to the success of the volunteers' communication and positive working relationships with the staff is the managing director's encouragement of open discussion and joint decisionmaking between staff and volunteers. For example, armed with experience, a job description, and final reports from the previous chairmen, volunteer project chairmen are encouraged to meet with relevant staff at the beginning of each project to review issues of common concern, agree on mutual goals, establish working schedules, and generate lists of prospective contacts. After such a meeting, the Council chairman and the director of volunteer services will work together to monitor the interdepartmental activities related to each project and facilitate communication between the volunteers and staff.

To summarize, some of the ingredients necessary to establish and maintain a program that offers professional-quality positions for serious volunteers are (1) an organization that is structured to provide the volunteers with clearly defined responsibilities for their programs; (2) leader-

ship from the senior management and volunteer officers that places a priority on mutual support and open staff-volunteer communication; and (3) frequent praise and public recognition for the contributions of the volunteers.

THE LARGER PERSPECTIVE ON VOLUNTEER PROFESSIONALISM

Since 1982, when Peck described some of the ways the NYPVC used professional employment practices in placing and supervising volunteers, there has been great advancement in the variety of techniques and level of sophistication in volunteer employment practices of recruitment, placement, training, supervision, and evaluation. Other articles in this issue of *The Journal of Arts Management and Law* will articulate some current practices in volunteer recruiting and evaluation. Additionally, for an updated overview of employment practices for volunteers, a good resource is the 1986 winter issue of the *American Association for Museum Volunteers Newsletter* entitled Management of Museum Volunteers. This issue gives concise guidelines for recruiting, training, and evaluating volunteers.⁴

Recently in this same newsletter, Barbara Kelly of the Denver Museum focused on the issue of professionalism in volunteering. She asks

If professionalism does not imply money, then what factors does it include? My definition would be (1) responsibility and accountability, (2) reliability, (3) efficiency, (4) ability to perform according to defined standards, (5) pride in work, (6) optimum presentation of oneself, (7) a nonemotional, rational approach to problem solving, (8) a commitment to the institution and task, and (9) most importantly, a willingness to support the leaders, both staff and volunteers, in achievement of mutual goals.⁵

This list of professional attitudes and behaviors is useful to us because it implies that there are very strong achievement motivations among volunteers who are willing to make such professional commitments.

While the components of the NYPVC mentioned above define a professional organization, they do not account entirely for the very high level of commitment from competent volunteers who have many demands on their time and are coveted by other organizations. (In addition to their demanding roles at the Philharmonic, the leadership volunteers usually have at least one other responsible volunteer position.) The remainder of this article will explore some theories on the relationships between motivation and organizational climate and consider how these ideas are applicable to the NYPVC.

PSYCHIC REWARDS

Since volunteers are not paid, psychic rewards are the only remuneration they receive. To increase their effectiveness and keep their energies committed to our particular organization, it seems necessary to recognize that volunteers seek a great variety of such rewards. We must develop a work environment or organizational climate that provides all the needed types of psychic rewards. Most volunteers want to do professional-quality work that benefits the organization, but there are additional levels of rewards that both increase their motivation and enhance their personal growth.

Achievement Motivation among Council Officers

Recently, the NYPVC chairman asked her officers to respond to a questionnaire produced by the Junior League of Cleveland, Inc., which asked each individual to answer questions that would show his or her preferences among three different leadership styles—to promote (1) expression of individual feelings, (2) an emphasis on group climate, or (3) achievement of the tasks. The nine officers and director of volunteer services were asked to rate responses to ten questions in order of their individual preferences. For example, one question reads

- You are leading a meeting; it is important to
- (a) Keep focused on the agenda (achievement of task);
 - (b) Focus on each individual's feelings and help people express their emotional reactions to the issue (individual expression);
 - (c) Focus on the differing positions people take and how they deal with each other (group climate orientation).⁶

The composite scores of the NYPVC volunteers indicated a very strong task or achievement orientation. All but one of ten participants scored highest in preferences that focused on achievement of the task. The questionnaire was intended to help the volunteer officers analyze their own strengths and be aware of aspects of leadership they may have overlooked. The results suggest that these volunteers may need to increase their attention to individual expression of ideas and feelings and group decisionmaking. However, the questionnaire also provides useful insight into the factors that motivate these volunteer leaders.

Since New York City is an achievement-oriented environment, a high level of achievement motivation among NYPVC volunteers is no surprise. Furthermore, the Council's professional employment practices, leadership structure, and program focus described above contribute to

their sense of professionalism and job satisfaction. The environment and motivational systems at the Philharmonic, however, seem to be more complex than this. Further exploration of the motives and needs of the volunteers—the basis for psychic rewards—in relation to the organizational climate is required.

The Theoretical Relationships between Motivation and Organizational Climate

In her book, *The Effective Management of Volunteer Programs*, Marlene Wilson identifies four interdependent elements that affect work behavior.

1. The motives and needs a person brings to the situation;
2. The job or task to be done;
3. The personal strengths, weaknesses, and leadership style of the manager; and
4. The climate of the organization.⁷

To these I would add a fifth element that seems necessary in charitable organizations: the organization must have a compelling and well-articulated mission.

To further explain work behavior, Wilson identified three types of motivational systems—affiliation motivation, achievement motivation, and power motivation—and defined each of these by describing the aspects of organizational climate that would support each type.

To create an affiliation-oriented climate:

1. encourage close, *warm relationships*;
2. give considerable *support* and encouragement;
3. provide a great deal of *freedom* and little structure or constraint; and
4. make the individual feel like an *accepted member of your group*.

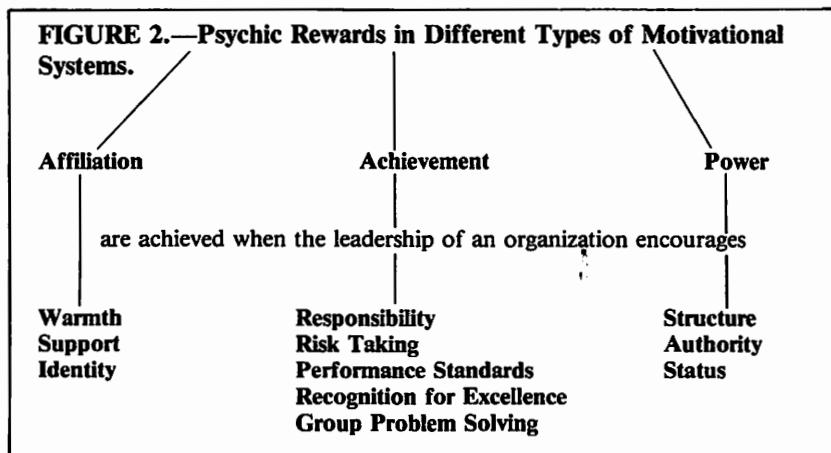
To create an achievement-oriented climate:

1. emphasize personal *responsibility*;
2. allow and encourage calculated *risks and innovation*; and
3. give *recognition* and reward for *excellent performance*—not for mediocre or poor performance.

To create a power-oriented climate:

1. provide considerable *structure*, such as rules, policies, etc.;
2. allow people to obtain positions of responsibility, *authority, and status*; and
3. encourage the use of *formal authority* as a basis for resolving conflict and disagreement.⁸

Figure 2 illustrates another way to express Wilson's description of motivational systems in relation to factors of organizational climate.



Although Wilson implies that these motivational systems and organizational supports are mutually exclusive, we shall see that in the NYPVC they all co-exist to a high degree and are mutually supportive.

Affiliation Motivation

Affiliation rewards have been the major tool of volunteer organizations for years. At the annual conventions of the American Symphony Orchestra League, volunteer workshop leaders emphasize warmth, praise, support, and encouragement. Furthermore, in *The One Minute Manager*, Kenneth Blanchard argues that giving praise and warmth are at least half of the key to success for all managers.⁹

While an organization as tightly structured and achievement-oriented as the NYPVC might not appear to foster affiliation motivation, the structure is actually very instrumental in providing a well-trained group of leaders and co-workers who understand that an important aspect of their job is to support each other, give praise and recognition, and create a feeling of warmth and good fellowship. Efforts are made, usually successfully, to find a comfortable role for each volunteer with people he or she enjoys. In addition to being interesting and satisfying, the work should be enjoyable. Great care is taken to create pleasant, positive work environments.

Volunteer project chairmen who do not generate a high level of warmth and support or who have difficulty accepting the diversity of personalities will receive informal training from their advising vice chair-

man on ways to support and appreciate their volunteer workers. Such advice might include

- be available to your volunteers when they are working to assist and praise them;
- schedule and plan activities so the work will be pleasantly paced and not frantic;
- divide the work so more people can participate;
- provide refreshments and a social time for your workers; and
- invite the Council chairman or a member of the senior staff to thank them for their participation.

Project chairmen who cannot learn to delegate, praise, and work with a variety of people are not invited to continue in this type of role.

The membership structure of the Council also contributes to the psychic rewards of affiliation. Belonging to a working committee within a powerful membership organization creates both small- and large-group identity. The more a volunteer participates, the more he or she will feel a sense of acceptance and involvement and will identify with the group.

While dispensing praise and warmth to meet the affiliation needs of their volunteer workers is clearly a tool employed by the officers and program chairmen to achieve their goals, these leaders also frequently express appreciation for the warmth and support they receive from each other and from the senior management of the Philharmonic. We will see that affiliation rewards also become power rewards when bestowed by those in power.

Achievement and Power

In addition to professional employment practices, which provide a high level of psychic rewards for people with achievement motivations, the NYPVC structure described earlier provides the officers and project chairmen with power rewards such as authority and status. In fact, the achievement and power rewards desired and received by members of the Council are so closely connected that it would be redundant to try to illustrate them separately. Instead I would like to discuss the ways the following four elements of Council organizational climate and leadership provide both achievement and power rewards.

1. The volunteer organization is structured so volunteer leaders make the operational decisions and manage other volunteers;
2. The volunteer leadership team provides its own training and mutual support;

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3. The volunteer organization operates as an internal department of the Philharmonic with its own support staff and access to the senior management of the Philharmonic; and
4. The individual volunteers and the contributions of the Council are highly valued by the Philharmonic managing director, senior staff, and key board members.

Volunteer Management

The volunteer officers manage their own programs and the other volunteers, giving the leaders the achievement rewards of top management responsibilities and recognition for performance. Because they make decisions and are elected to their positions, they also receive the power rewards of authority and status.

The Council leaders have a clear sense of their responsibilities as leaders to sustain the climate of professionalism and mutual support. Marlene Wilson describes the roles of managers or leaders as follows: "The most important and dramatic determinant of climate seems to be the leadership style utilized by managers or by informal leaders." She continues to say that "leadership is a dynamic process and varies from situation to situation, based on the unique combination of leader, follower, work to be done, and situation," meaning that "the manager does not have *a* role, but rather *many* roles to fill."¹⁰ Thus, because the volunteer officers understand the complexities and importance of their leadership roles, the leadership structure described earlier is a major factor in the success of the NYPVC as well as a source of both achievement and power rewards for the individual leaders.

Another source of achievement and power rewards is the encouragement to set high goals and take risks. Council volunteer project chairmen are in charge of their projects. They have the support of the organization and the freedom to take risks and develop ideas within specifically defined organizational guidelines (see page 55). With the support of their advising vice chairmen, the Council chairman, and the director of volunteer services, they

- set goals and plan projects;
- recruit committees to solicit underwriting, sell tickets, and carry out projects;
- develop budgets;
- create ideas for fundraising galas or gift items;
- solicit bids from vendors;

- select the appropriate vendors and monitor the quality of work; and
- develop and refine marketing tools, which may include activities as diverse as
 - organizing the resources to design, print, and individually address 5,000 gala invitations to be sent to a selected list of New York's social elite; or
 - publishing 175,000 copies of a 40-page Radiothon Catalogue (listing 1,200 gift items they have solicited) which are then mailed by a professional mailing house using computerized mailing lists the volunteers have helped develop over the past ten years.

One example of goal setting and risk taking by a project chairman occurred recently when, in response to a suggestion made by the preceding chairman in her final report, a project chairman requested an increase in the traditional ticket price for an event. Concurrently she accepted the suggestion from the development director to add a new price category for benefactor tables. Both ideas were approved, and she set a goal for selling the usual number of tickets at the increased price as well as ten benefactor tables. She personally solicited several potential corporate benefactors. The event was a sell-out, and eleven benefactor tables were sold because of the powerful combination of the traditional attraction of the event for Philharmonic patrons, the chairman's infectious enthusiasm and attention to details, and the support she received from the Council leadership team and Philharmonic staff. The net proceeds from the event nearly doubled from the preceding year. In addition to thank-you letters and public recognition, this chairman has been rewarded with an offer to chair another prestigious event.

The vice chairmen who supervise the project chairmen have even broader responsibilities to advise and assist these chairmen, monitor schedules and budgets, and coordinate resources and communication. In conjunction with the project chairmen, they are responsible for large fundraising projects and receive recognition for excellent performance. Along with the Council chairman and first vice chairman, they have the status, power, and authority that create the satisfactions that come from being top management.

Training and Support

With assistance from the staff when requested, the volunteer leadership team provides its own training and acts as a support group, thus

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creating a sense of strong internal support and allowing members to grow into positions of greater responsibility. The training process is structured by the NYPVC nomination procedures, which require that to be eligible for nomination as a vice chairman, a member must have completed at least two years as the chairman of one or more projects.

Each year the overall Council chairman, with advice from the Executive Committee, selects the project chairmen from those who have shown interest and leadership ability. He or she will make an effort to offer those with leadership ability a chairmanship that will help them grow and expand their view of how the Council works. For example, in 1985, one young potential leader chaired a small benefit party as her first project. To broaden her perspective, she was then asked to chair the membership committee, a very responsible position in which she is becoming more familiar with the broad Council membership, the formal and informal rules, the way the office works, and the ways NYPVC members communicate with each other and with staff. She is asked to set goals, plan and delegate tasks, provide support for her committee members, and see that they follow through on tasks. She is learning that the Council has very high expectations for accuracy and attention to detail. She also is learning to be patient with her workers and take constructive criticism as well as praise.

Some project chairmen who are very successful party fundraisers would not be good managers or officers because they are not able to delegate responsibilities and be supportive of others. They are talented at generating and implementing exciting ideas, thus creating an event that "sells." They are self-disciplined, have very high standards, are detail oriented, and are very demanding of themselves and others. Even though they are not good managers of people, these program or event chairmen can perform well within the NYPVC structure because the Council officers and director of volunteer services will support them and shield other volunteers and staff from unreasonable demands. They will reassure the chairmen that the work to be done will be on the list of priorities; if delays and problems arise, they will help keep communication channels open.

The leadership training process continues for vice chairmen, who usually complete at least two years in this role before being nominated to become first vice chairman, then automatically Council chairman. Thus, each ascending NYPVC chairman has at least five years of training and supervisory experience. Within the top level of volunteer management, poor performance is not tolerated. When the peer group perceives that a weakness of one of its members will interfere with the Council's success, ways will be sought to fill the gap or help the individual change his or her behavior.

Departmental Status

The NYPVC functions as a department of the Philharmonic—in other words, as an integral part of the entire Philharmonic structure, giving the volunteers access to and support from the senior management and the rest of the staff. Although mutual working schedules are established, the priorities of the other departments may sometimes distract the paid staff from maintaining mutually agreed-on schedules. When this happens, volunteers may feel that their priorities are being ignored. The director of volunteer services and NYPVC chairman will work with the staff and volunteers to reschedule the activities and repair damaged communications channels. Thus, the volunteers receive the achievement rewards of being an integral part of a well-managed, supportive organization as well as the power rewards of status and authority within this larger prestigious organization.

In return for the organization's trust, the volunteers follow a strict set of rules requiring senior management approval of schedules, budgets, printed materials, and contact with donors. The director of volunteer services is their guide in preparing budgets and printed materials and obtaining approvals. She can enlist the aid of any staff person and plays the role of a partner in the daily activities, particularly to the overall NYPVC chairman. Organizationally she reports to the director of development, but, as in many other areas of the Council and Philharmonic functioning, there is a great deal of flexibility in her role, and she is encouraged to seek the advice and assistance of any member of the staff as needed.

In addition to her role as partner to the volunteer leadership and liaison with the paid staff, the director of volunteers hires and supervises support staff (one secretary and one administrative assistant) assigned to the Council. Having the services of such staff greatly increases the level of professionalism and achievement of the volunteers.

Integrating a strong volunteer group into the central management structure of an organization requires a professionally secure staff willing to give credit to productive volunteers as well as secure volunteers willing to have their work closely scrutinized. It is the job of the NYPVC chairman to bring his or her suggestions to the senior management and volunteer leadership for discussion and joint decisionmaking.

Rewards from the Philharmonic Senior Management and Board

Wilson's description of the importance of the leadership style of the managers is equally true when analyzing the dynamics of the Philharmonic senior management and board in relation to the Volunteer Council. As described above, the managing director and key board members

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can clearly articulate the value of the NYPVC to the Philharmonic and frequently express their gratitude and support. More than anyone, the managing director sets the example for providing achievement and power rewards by working with the volunteer leaders as though they were professional staff. Staff members are made aware that they should let the volunteers receive the spotlight and recognition for their work, even though staff contributions to the project might have been equally critical to its success. Volunteers also take time to recognize and thank the staff. The managing director keeps the NYPVC officers informed about upcoming events and long-range possibilities and shares with them some of the interesting and amusing "behind the scenes" stories that unfold. As part of their psychic rewards, the volunteer leaders receive invitations to many Philharmonic events and are invited to host special parties honoring guest artists.

Thus, the Philharmonic's managing director communicates a sense of security and trust in working with powerful, productive volunteers. He was instrumental in designing their organization, and his ultimate authority and leadership are completely accepted because NYPVC leaders know they are part of the decisionmaking process.

While several members of the Philharmonic board also are members of the NYPVC and participate in its programs, the differences in the roles and prerogatives of the board and Council are very clear and distinct. The board president and those long-standing dual members described above stay informed and ready to support and assist the Council as needed. Roles they and the managing director might play include helping orient a new Council chairman to some of the complexities of his or her duties, informing their co-board members about the need to support a particular activity, and contributing to the Council's long-range planning.

CONCLUSION

To complete this description of the psychic rewards generated by the structure and leadership of the Philharmonic, it should be noted that precisely because of their commitment, training, and support for each other, the leadership team of the NYPVC has acquired significant and highly recognized power, status, and authority. Those who desire a combination of *affiliation* and *power* rewards receive them as *recognition* for *achievements* that contribute to the success of the whole group. This interdependence of psychic rewards in each of the three motivational areas seems to be one of the greatest strengths of the Council.

Such interconnections of affiliation, achievement, and power re-

wards can lead to a sense of empowerment. In *The Power Handbook*, Pamela Cumings describes "empowerment" as follows.

To feel empowered is to have a strong sense of "can do," a feeling of control and choice over life's events. People who are empowered are fully aware of all their resources—their strengths and weaknesses, their feelings and frustrations, their values and attitudes. They are clear about what they want to accomplish in life and are optimistic about their ability to achieve these goals.¹¹

This state of feeling empowered is the result of exercising one's abilities and taking responsibility and risks within organizations or other group structures that encourage self esteem, personal growth, and achievement. Volunteers will certainly be loyal to the arts organization that provides a work environment in which they can experience a variety of psychic rewards leading to the ultimate reward: a sense of empowerment.

NOTES

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2. The organizational chart and program list are taken from the New York Philharmonic Volunteer Council Handbook, revised in 1985.
3. Phariss, B., editor. Introduction to Employing volunteers: A professional approach at the New York Philharmonic. *Performing arts ideabooks*, 1.
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9. Blanchard, K., and S. Johnson. 1982. *The one minute manager*. New York: William Morrow & Co., Inc.
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Evaluation of Volunteer Efforts

SUSAN J. ELLIS

Introduction

Because time, money, and other resources are expended on the involvement of volunteers—by both the recipient organization and the volunteers themselves—it is good management practice to evaluate whether the expense is justified. It is also important to assess what volunteers accomplish and how effective they are. This information is of special interest to volunteers as well as managers, since no one wants to devote time and energy to something without impact. The issue of volunteer evaluation is generic and is very important to arts managers.

The volunteer component is often overlooked when an organization conducts an internal evaluation study. Since most of the services volunteers provide are intertwined with the work of employees, the volunteer program must be included in an evaluation to obtain a complete picture of an organization's effectiveness.

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One of the reasons volunteers are often left out of agency evaluations is that no goals or objectives have been articulated for the volunteer program. Volunteers are viewed as useful but peripheral additions to the organization's basic services. It is assumed that volunteer worth is somehow self-evident, needing no further assessment. If goals and objectives for volunteers are identified, however, it becomes logical to assess whether or not they were achieved. This process also provides more meaningful long-term recognition for the volunteers.

One of the least creative questions posed to volunteer program leaders is "How many volunteers do we have, and how many hours did they give us this year?" Too often this is the extent of program "evaluation" for the volunteer component. A tally of hours served without analysis of what was accomplished is virtually worthless, as the quantity of involvement rarely, if ever, demonstrates the quality of performance.

This same principle holds true for assessing each individual volunteer's work. Recognition based solely on hours clocked is impersonal and nonmotivating. Many organizations are reluctant to evaluate individual volunteers because of a mistaken belief that gratitude for donated services must override concern for whether or not such services are worthwhile, but it should be recognized that *every volunteer wants to perform effectively*. Examining each volunteer's contribution is one way to demonstrate that volunteer services are taken seriously and that the organization wants to make sure each person's efforts are productive.

Individual volunteer performance assessment is connected to employee performance assessment just as volunteer program evaluation is connected to the overall organization evaluation. Some similarity needs to exist between the standards to which both employees and volunteers are held. In the arts, reluctance to do an assessment often exists because of a blurring of lines between "creative expression" and "productivity." Evaluation must be thought of as an opportunity to praise as well as criticize and as a chance to be supportive to all workers who are doing their jobs effectively.

Both programmatic and individual evaluation, when done correctly, become a two-way process, providing a forum for feedback from all parties. While evaluation examines actions that occurred in the past, its major purpose is to plan for the future. The process is inherently positive and enables everyone to move forward together.

Volunteer Program Evaluation

There are many approaches to program evaluation. Periodic informal evaluations happen naturally as an aspect of good management. For example, if a new project is established, its pioneer participants are likely

Evaluation of Volunteer Efforts

to meet after a few months to discuss its progress. At some point, however, the organization should move past "this is how we *think* or *feel* things are going" and attempt to study what is occurring more objectively. This is the purpose of regular formal evaluation studies. A formal evaluation begins with a review of the volunteer program's stated goals and objectives and assesses whether and how these were met—and what unexpected accomplishments might have occurred.

If the volunteer program's goals and objectives were thoughtfully worded, it should be relatively easy to determine if they were met. For example, if at the start of the year the program wanted "to involve at least five volunteers from the immediate neighborhood surrounding our facility," it should be possible to find documentation of who was recruited this year, where each person lives, and whether five of the new volunteers live within a few blocks of the facility. Thus, there is a major correlation between goals and objectives, the evaluation process, and ongoing record-keeping. Without records kept on a current basis, there often is no way to gather needed data. If an organization intends to conduct an evaluation at the end of the year, it is necessary to set up systems to collect the right data from the beginning of the project. Some data may only need to be collected for one year—long enough to assess a specific question.

The major problem with evaluation by objectives is that it is insufficient to ask only "Did we meet our goals?" It is equally important to discover *how* those goals were met—the quality of performance or service—and whether they were the right or best goals. This creates the need for an evaluation study that involves asking people for their opinions.

An annual evaluation in an arts organization might analyze volunteer program performance in several areas.

1. The actual quantity and quality of the work done by volunteers in each assignment category;
2. Activities that are so vital they deserve additional support, and those that need improvement;
3. Gaps in needed services, and volunteer assignments that are no longer pertinent;
4. The accomplishments of the volunteer management team, including such overview questions as the demographic makeup of the volunteer corps, number and type of recruitment outreach efforts, etc.;
5. The type and degree of service provided to the salaried staff by volunteers and/or the volunteer program office; and
6. The benefits to the organization as a whole from volunteer involvement.

Some specific questions that could be asked to assess the contribution of volunteers are similar to those asked about the work of employees. In addition, some other avenues of inquiry can help identify the value of volunteers.

1. Have our visitors/audience expressed any awareness of, appreciation for, or comments about our volunteers?
2. What were we able to do more of this year than last because of help from volunteers?
3. What did volunteers free staff to do?
4. What innovations or experiments were we able to attempt this year because volunteers agreed to test something new?
5. In which assignments did we have the most turnover and why? Which assignments were the most popular with volunteers and why?
6. Has our public image changed, and can we trace any of this change to the impact of volunteers?
7. Is our volunteer corps representative of the community/public we serve?
8. Have salaried staff members measurably developed their supervisory skills as a result of working with volunteers?

Questions such as these will provide information that immediately translates into management decisions. The data gathered can be used to uncover training needs, recruitment strategies, and service deserving recognition.

In designing an evaluation, choices must be made, as it is impossible to assess every aspect of an organization or program all at once. Certain priority areas should be selected each year to receive special attention in the evaluation study. For example, one year the organization might assess the value of the volunteer orientation session, the difference volunteers make to young visitors, and the feelings of volunteers concerning the annual recognition event. Other aspects of the volunteer program might be covered by asking, "What else do you want to tell us?", but these three areas will each be analyzed in depth through several specific questions. The following year, different priorities can be studied, with perhaps one or two follow-up questions on the previous year's areas of focus to see if changes have been noticed.

Some organizations hire an outside evaluator or utilize a voluntary action center to conduct the assessment. In such a case, the volunteer program leader should meet with the evaluator and express his/her managerial concerns. The evaluation should be designed to elicit data that will affect management decisions, and no outside consultant or serv-

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ice organization can determine what the needs are. The role of the evaluator is to find the best (and most objective) way to get the information requested.

If the evaluation is to be done in-house, the question of who should do it arises. One recommendation is to recruit an evaluation team comprised of representatives of the paid staff and the volunteers. Members of the public served, someone from top administration, and a volunteer from the board of directors might also be included. The team should not be too large but should be diverse enough to ensure that the data collected will be analyzed from several perspectives. The goal is to elicit open and honest feedback. The priority areas to be evaluated will suggest who might influence the results if they are the ones asking the questions.

The evaluation team's first role is to design the evaluation study itself. This means determining the following.

1. Who will be the audience for the final evaluation report? Will the report be shown to a funding source? The public? Or will it be used primarily as an internal guide to management? The answer to this question will affect the areas to be studied and how the final report will be presented.

2. What program areas are the priorities for evaluation this year and why?

3. What is being planned by the organization in the coming year that will involve volunteers? What, therefore, should be learned now about past activities that will prove helpful in addressing this upcoming activity?

4. What are the available means for conducting an evaluation? Is there money for a mailed survey? Are there meetings scheduled during which a questionnaire might be administered on site to groups of staff, volunteers, or members of the public? Are there volunteers or employees available to conduct interviews?

5. Given the program areas to be assessed, who might be the best sources of information? Choices include

- Volunteers: active and/or inactive (Note: it is sometimes possible to learn more from people who left a volunteer assignment than from volunteers still in it.);
- Employees: those who supervise volunteers and those who do not;
- Administration: including board members (who are also volunteers);
- The organization's audience or visitors: present and/or past. This might include spot checking people in the "General Membership" category;

- The public (community): in general, or special segments such as specific age groups, geographic areas, or agencies/businesses with concerns related to the organization's mission;
- Other arts organizations;
- The leaders of the volunteer program;
- Written reference materials: census reports, previous annual reports, etc.

6. Having selected the sources, how will the focus be chosen? Will we try to reach everyone, or will a sample be selected?

7. What questions should be asked? How can they be asked in the most neutral, nonleading form so the answers will be as objective as possible? Also, scaling of questions should ensure that the answers are comparable.

8. Will the method of questioning be a written questionnaire? A personal interview? Group discussions? The facilitator should be impartial and trained not to skein results.

9. Will the questionnaire be mailed or administered in person?

10. Who will administer the questionnaire? The volunteer program staff? Volunteers? The evaluation team? Specially recruited, outside volunteers, such as students from a college course on statistics?

11. Once data are obtained, how will they be collated and analyzed to ensure that the right conclusions are reached? Recognize that data can be interpreted in many different ways.

The subject of how to design an effective evaluation is too complex to discuss here, but the questions just outlined should provide a starting point from which to seek the necessary assistance. In discussing the evaluation of a volunteer program, the program leader can recruit an expert consultant from a corporation, marketing firm, or business school who is skilled in evaluation techniques to serve as advisor to the evaluation team.

Once the evaluation has been completed, there are many uses for the final report. First, the evaluation should be shared with all volunteers so they can learn of their cumulative achievements and impact (which is true recognition) and also understand the concerns to be addressed in the coming months (which encourages their ownership of the program and enlists their help in finding solutions). Second, the evaluation can be shown to current and potential funders to illustrate that their dollars were leveraged by volunteers into services worth far more than the value of the original cash contribution. Managerially, the evaluation can be translated into developing training programs to improve the skills shown

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to be weak, launching recruitment campaigns to locate volunteers with targeted skills, and creating better promotion opportunities for experienced volunteers. The report is as important for what it shows is being done right as for the weak areas it uncovers. Finally, the evaluation can demonstrate to resistant salaried staff that volunteers are achieving important things and should be better supported.

One caveat should be offered to managers: be cautious of drawing comparisons between the work of volunteers and that of employees. Each group should be handling assignments that are tangibly different; therefore, their evaluations should be considered separately. Talented volunteers may become threatening to the salaried staff who might worry about their job security if the work of volunteers is praised in comparison. Arts organizations need both their employees and their volunteers, and any evaluation should recognize the achievements of both groups.

One reason often cited for involving volunteers is to assess the community perspective. Volunteers are both outsiders and insiders, and they represent the point of view of the public. Thus, any program evaluation should be designed to elicit maximum feedback from the volunteers. It offers a regular opportunity to learn what volunteers—as representatives of the public—think about the organization's programs, services, and other elements.

As with any program evaluation, evaluating the volunteer program is worth the effort only if the results of the assessment are analyzed and plans are developed to implement necessary changes. If done correctly, an evaluation will indicate areas of strength as well as weakness, since improvements might come simply from doing more of what is already being done effectively. From the volunteer management perspective, the importance of evaluation is the need to ensure that volunteers are assigned to work that genuinely requires attention so their efforts are not wasted on useless activities.

Ongoing Assessment

Apart from a periodic evaluation of the volunteer program, an organization should want to know throughout the year whether volunteers are being effective and whether the most supportive working environment for volunteers is being provided. Gaining this information involves requiring reports from the director of volunteers with the same frequency as reports from other department heads, usually monthly. The data in these reports will be compiled from statistics maintained in the volunteer office and from information documented by each unit/department in which volunteers are active. Executive directors of arts organizations should read such reports carefully. Volunteers often far outnumber

an organization's employees, and data concerning volunteers can be quite revealing.

In studying regular reports, managers should look for the rate of turnover in specific assignment categories, accomplishments of short-term versus long-term volunteers, and assignments that have been vacant for an unusually long period of time. These data may alert the administrator to trouble spots. For example, if turnover seems to occur monthly in a particular work area, there may be a problem with the paid supervisory staff or the physical work environment there.

As with all data, numbers alone do not tell the whole story. Some statistics reflect normal variables in the operation of a volunteer program, such as anticipated high rates of turnover in particular months (for example, student volunteers leaving in May or June). Other vacancies may demonstrate careful screening by the director of volunteers, who is willing to allow vacancies to exist for a time rather than filling slots with inappropriate volunteers. This situation might be indicated in the report by a higher number of screening interviews each month than the number of new volunteers joining the organization.

Ongoing volunteer program reports should give the organization useful information such as

- The profile of the organization's volunteers: age ranges, racial distribution, neighborhoods represented, percentage of men and women;
- Exactly what volunteers do (both continuing assignments and special projects in any month);
- Which work areas do and do not utilize volunteers and why;
- Where the biggest turnover of volunteers occurs and why;
- The number, type, and results of public relations and community contacts made by the volunteer program office in any month; and
- Observations or suggestions made by volunteers that might be useful in management decisionmaking.

Much of this information is useful in ongoing publicity and fundraising efforts as well as in internal managing.

Evaluating the Director of Volunteers

The evaluation of a volunteer program is not the same as an evaluation of the director of volunteers. It is justifiable to assess the competence and achievements of the leader of the volunteer program by examining the way the program is managed, but the achievements of the volunteers are not necessarily the reflection—nor the fault—of the director of volunteers.

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A great deal depends on the organization's expectations of the position of director of volunteers. If all that is wanted is for the volunteer program to be "maintained," then little creativity or vision are needed from the program leader. If volunteers are truly valued, however, the director of volunteers should be assessed as a contributing member of the organization's administrative team.

The director of volunteers should be responsible for keeping informed about volunteerism in general. Is s/he aware of what is happening with citizen participation in other types of settings? Can s/he express long-range goals for the volunteer program and predict changes that might occur in the future? Is s/he aware of trends in the arts and how these might affect the organization's ongoing needs for volunteer involvement?

Individual Volunteer Performance Assessment

Individual volunteer performance assessment is part of the spectrum of good volunteer program management techniques. It begins with having accurate volunteer job descriptions. A person can be held responsible for a specific set of tasks only if s/he clearly agreed to them when joining the organization. One of the major reasons groups face problems with ineffective volunteers is that no one set up expectations from the beginning. In the absence of a job description, any criticism of a volunteer's performance can be countered with the statement that the volunteer was not told what was expected. This places the whole supervisory process on a personal level, which is uncomfortable for managers and volunteers. If an organization has accurate volunteer job descriptions, the evaluation process logically—and objectively—begins with an assessment of whether or not the volunteer has accomplished the tasks that were stated. Basically, the volunteer job description is a set of goals and objectives for the individual.

Some still question whether it is appropriate to evaluate individual volunteers. They feel that volunteering should not be treated as a job and that volunteers will be offended to learn that someone will be assessing their level of performance. In the arts especially, some may confuse the social aspects of volunteering with people's desire to be of real help in supporting cultural institutions. In order to answer such concerns, it is necessary to address two philosophic issue areas: (1) What are general attitudes about evaluation, and (2) What is the most effective way to work with volunteers?

Despite many platitudes about the value of constructive criticism, most people really do not want to be told about their weaknesses. Even fewer enjoy being the ones doing the telling. Many employee evaluation

systems are little more than a cursory review of work done over a period of time solely for the purpose of determining whether the employee will get a raise or a promotion. This connection of "evaluation" to pay raises anxiety levels and results in very little learning.

Because so few people have positive feelings about their experiences in being evaluated as employees, the concept of evaluating volunteers is often rejected as unnecessary. It is felt that people should not be subjected to scrutiny for no reason (i.e., no raise or promotion at stake), especially when the organization should be grateful for the time these people are giving voluntarily.

Gratitude for volunteer service is legitimate, but it is hardly a reason to accept any and all work from volunteers as equally helpful. Organizationally, it is important to know who is doing a job well, what training may be needed to improve skills, and similar managerial concerns. Without a performance assessment process, leaders of an organization cannot know if goals and objectives are being met to the highest possible standards.

It is also important to note that evaluation can be extremely supportive of volunteers. Most volunteers want to do the best possible job. A well-designed performance evaluation, therefore, gives feedback—and meaningful recognition—on how well they are doing their jobs. If weak areas are uncovered, volunteers have the opportunity to improve, which may mean the need for better training from the organization. Wanting a volunteer to perform more effectively is an indication of respect, of faith that the person has the ability to improve. Not giving feedback implies a sense of low expectations from volunteers.

The challenge is to conduct evaluation as a two-way process that gives both parties the chance to reaffirm commitment to each other (or to decide to end the relationship). The evaluation might be called a "progress assessment" or a "future action plan" so it is not simply a rehashing of the past. Emphasis should be on what needs to be done to get even more from the working relationship. The volunteer should also be encouraged to evaluate the support s/he receives from the organization.

The best action plan process is a combination of written forms and a personal interview. One might start with a questionnaire completed independently by the volunteer and his or her immediate supervisor. The questionnaire should be attached to the job description accepted by the volunteer at the start of the period to be evaluated. Sample questions might include

1. Which tasks on the job description did you do most this year? (or, for the supervisor, "Which tasks did the volunteer do this year?")

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2. Which did you do only rarely or not at all? Should these be deleted from the job description?
3. Were there any tasks you did that are not listed? Should these be added to the job description?
4. How would you assess your performance of each task?
5. What might help you to improve your performance of these tasks?
6. How would you describe the supervision you received on this assignment?
7. How helpful was the training you received?
8. What suggestions do you have that might make this work area more productive?
9. Do you wish to continue in this assignment?
10. Is there anything else you would like to tell us?

Each organization will ask different questions, depending on its needs. It is important to remember, however, that all assessment begins with the volunteer job description.

Having each completed the preliminary questionnaire, the volunteer and supervisor meet to compare their answers. Each can provide recognition of achievements and criticism of weak areas. The goal of this meeting, however, is to determine an action plan for the future. Together (or with the help of the volunteer program leader), they negotiate (1) whether the volunteer will continue in the assignment as is or with some changes; (2) what additional training or chances to participate the volunteer will receive in the coming months; (3) specific strategies to improve weak areas uncovered; and (4) what new things the volunteer hopes to do in the coming months. This action plan is written, dated, and signed by both parties. It then goes into the volunteer's record and will be used at the next performance assessment.

For the volunteer program leader, this future-oriented assessment process has clear management implications. From the results of the action plans, the leader is able to

1. Determine which volunteers will remain in their present assignments or be reassigned (either as a "promotion" or to utilize their skills in a different way);
2. Update volunteer job descriptions throughout the organization;
3. Identify training needs (i.e., if volunteers are having trouble accomplishing parts of their assignments, perhaps the organization can provide some skill development areas);
4. Discover which staff members are doing a good job supporting volunteers and which need to be trained to be better supervisors;

5. Obtain information about volunteers that can be used during the annual recognition process;
6. Give volunteers the chance to give suggestions from their perspective that can help each volunteer assignment area and/or the entire organization to work better; and
7. Allow some volunteers to leave or be asked to leave the organization.

There are many other approaches to individual performance assessment of volunteers. While the first line of evaluation needs to be the immediate supervisor of the volunteer, since often only that person has first-hand knowledge of what the volunteer has been doing, the director of volunteers might participate in a three-way (second line) meeting with the volunteer and/or the staff member. Individual evaluations may be conducted again through an evaluation team or panel of people selected annually to assess the accomplishments of all volunteers.

Regardless of who conducts the evaluations, it is important that they be done on a regular basis for every volunteer. If a performance assessment is only done when a volunteer is doing a job poorly, the process is likely to be viewed negatively. On the other hand, if volunteers expect an annual progress assessment that occurs equitably and impartially for everyone, the procedure itself becomes neutral and can be approached positively.

An exit interview should be held with volunteers who are leaving the organization. If the termination date is known in advance, the exit interview permits closure for both the volunteer and the organization and demonstrates recognition for the end of valued services. If a volunteer simply stops coming, the effort to contact him or her and discover the reason(s) can be very helpful. At best, it might result in the volunteer recommitting to the organization. At worst, it will reveal what caused dissatisfaction—information that might help prevent future unexpected departures of volunteers.

Firing a Volunteer

The possibility exists that a volunteer is not maintaining an acceptable standard of work and should be “fired.” Ideally, the mutual assessment process will allow the volunteer to admit discomfort in his or her role. If this does not occur, however, organizational leaders must reassign or fire volunteers who are not doing the work properly. If this is not done, volunteers will feel that hard work is unvalued while poor work is tolerated. It is better to support the majority of volunteers who are doing a fine job than to protect the few who are not.

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Ideally, the daily supervisory process will target volunteers who are having problems with their assignments. This should allow for troubleshooting well in advance of having to fire a volunteer. A trial run that allows both the organization and the volunteer to assess the success of the volunteer's assignment after a few weeks permits early handling of a clearly inappropriate placement. No volunteer should feel that his or her assignment is a right; all work must be assessed in terms of the organization's needs. The best volunteers understand and accept such a premise. Only weak volunteers place their sense of ownership over the good of the organization as a whole.

Reluctance to enforce standards may result from a feeling that dealing with a weak volunteer carries risks. Concern might center around losing a donor, complaints reaching someone important, or generating bad public relations. There may indeed be some backlash from asking a volunteer to leave, but keeping a volunteer who is doing poor work may be turning off (and away) good volunteers and potential donors. The consequences of not acting to remove an inappropriate volunteer are likely to be worse than any resulting from him or her being fired.

The need to fire a volunteer often is preventable by careful screening of candidates prior to assignment. If there are signs that a person might be inappropriate for a particular slot, concern about continuing a vacancy should not be so strong that the placement is made despite initial doubts. When inappropriate assignments are made, management time and energy are dissipated in dealing with the problems that result.

In recent years, court cases have established that volunteers must be treated with the same concern for civil rights that is shown to employees. This means that an organization must fire a volunteer in a legally correct manner. In general, the organization should have written documentation of the reasons for the dismissal. It is legitimate to establish certain rules for both employees and volunteers, the violation of which would result in automatic removal from a position. Aside from the commission of a crime, such as theft, an organization might stress that someone can be fired for removing an art object from the building without proper protective packaging, allowing visitors into security areas, and similar infractions. If volunteers are informed of these rules during their orientation, the organization can enforce the rules whenever they are violated. A written report of the incident should be kept. An appeals process, comparable for employees and volunteers, also should be established.

The need to remove a volunteer from a position because s/he is not performing up to expectations is more complicated. Here a distinction might be drawn between volunteers who have been with the organization a long time and those recruited by the current program leaders. Newer

volunteers should have been given a job description and told about the annual progress assessment. Weak performance should be identified early and attempts made either to train the volunteer or reassign him or her to another set of tasks. These actions should be recorded and dated. The decision to fire therefore comes as the final step of a series of actions designed to improve performance.

When a volunteer has longevity, it becomes harder to enforce standards that have previously been lax. It also may be impossible to determine whether or not the volunteer was told long ago what was expected. The first step is to agree with the volunteer on a job description. The person should write out what s/he has been doing, and the volunteer program leader should list what the organization needs in that position. By comparing the two lists, areas of agreement and disagreement can be identified. Once a job description has been negotiated, it becomes the basis for the volunteer's accountability. If the person resists the need for a job description, that can be a starting point for documenting a non-cooperative attitude.

Often a weak volunteer is not surprised to hear that the organization is dissatisfied. S/he senses the negative reactions of supervisors and colleagues and may feel some discomfort with his or her own performance. Confronting the volunteer directly is always more appropriate than complaining to others.

Focusing on a problem may uncover unexpected situations. The volunteer may not be the one causing the problem. If the assessment process truly elicits two-way feedback, it might show that an employee is being so nonsupportive that the volunteer cannot perform well. The employee should not automatically be assumed to be beyond blame. Each specific situation must be analyzed and appropriate action taken.

Assessing Employee Management of Volunteers

If volunteers are to be assessed, an organization also should evaluate whether or not employees have done their best to enable volunteers to perform well. Frequently no mention is made of working with volunteers in employees' job descriptions, which is a major oversight. If a staff member is expected to supervise or work with volunteers, that role should be part of the job description. To demonstrate sincerity in wanting to integrate volunteers into the organization, each staff member should be held accountable for his or her role in facilitating volunteer performance.

Pleasant and productive supervision of volunteers by the staff should be rewarded by the organization. Nonsupportive, unproductive interaction with volunteers should be critiqued and corrected. A system

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of rewards for employees who are successful managers of volunteers serves as a positive example for the entire staff.

Conclusion

The arts in the United States have always depended upon the involvement of volunteers for their survival. Volunteers, as patrons, donors, audiences, and operational support workers, have maintained most cultural institutions and organizations in communities large and small. Gratitude for such continuing voluntary service is legitimate, but this does not mean overlooking nonproductive work. The best recognition of the worth of volunteers is to maximize their impact.

The subject of evaluation reflects an organization's attitude about volunteers. If volunteers are not seen as part of the service team, no one will care about assessing their accomplishments. If, however, volunteers are accepted as important partners in achieving the organization's mission, evaluating their performance will be seen as important. In the last analysis, no one volunteers to waste time—and no arts organization can afford to waste anyone's time.

BIOGRAPHIES

Winifred Brown is the executive director of the Mayor's Voluntary Action Center in New York City. She is a member of the board of directors of VOLUNTEER, the National Center, and numerous other boards, including the YWCA of New York.

Minette Cooper is a member of the national board of Young Audiences and is program director for its Virginia chapter. She also is president of the Virginia Symphony and chairman of the Norfolk Commission on the Arts and Humanities.

Betty Jane Gerber is the immediate past president of the American Association of Museum Volunteers. She is presently vice president of the board of the National Museum of Women in the Arts.

Phyllis Mills is vice chairman of the board of the New York Philharmonic, where she reorganized the volunteer programs into the Volunteer Council. She is a member of the executive committee of the American Symphony Orchestra League and a board member of Lincoln Center.

Milton Rhodes is president of the American Council for the Arts. He is past executive director of the Arts Council of Winston-Salem, North Carolina.

Roundtable: Perspectives on Volunteers

Brann Wry: Good morning, and welcome to this roundtable on volunteers in the arts. I want to thank our host for the roundtable, Milton Rhodes, president of the American Council for the Arts, and his very able assistant, Sarah Foote.

The Journal of Arts Management and Law was founded around sixteen years ago as *Performing Arts Review*, which was taken over by Heldref Publications in 1981. At that point, the new executive editors—Joan Jeffri of Columbia University, Valerie Morris from The American University, and I—thought we should rename it and recast it into a journal that served the areas of arts management and arts law.

You will be part of the series of special issues that appear annually in the journal. We have investigated fields like public policy, information systems in the arts, labor relations in the arts, and consumer behavior and marketing in the arts. This year's special issue will focus on volunteerism in the arts in the United States. When we developed the topic, I thought immediately of Joan Kuyper and Susan Brainerd as two great leaders in volunteerism in the arts. I thank them and each of you for your contribution to this issue.

Susan Brainerd: Our working title for this issue of *The Journal of Arts Management and Law* is the Fabric of Cultural Volunteering. Although the latest Gallup poll showed that more than one in three people are volunteering today, there still is a buyers' market for volunteers because

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there are more positions available than volunteers to fill them. Managers in arts organizations are seeking ways to compete successfully for the time and energy of the serious volunteers that we all want. Therefore, we would like to share information among volunteers and volunteer managers about the roles of volunteers and how arts organizations can make the volunteer experience more productive and more enjoyable. I am grateful that you're here today to contribute your ideas on these issues.

Joan Kuyper: I also say welcome. When Susan and I started this project, we discussed the kinds of articles we wanted. We requested a variety of articles to represent all kinds of fields, but we felt we didn't have the personal testimonial type of article that was needed. This article will represent that offering of personal experience that gives life and interest to all the statistics. We picked Winnie Brown, the director of Mayor Koch's Voluntary Action Center, as a moderator because of her wide range of information in the field.

Winifred Brown: Today we have a distinguished panel of people whose experience lends a great deal to the discussion of volunteerism in the arts. Across the country, there's a fascinating dialogue going on about the meaning of volunteerism and how it contributes to life in the 1980s. Volunteerism is an American value that we have treasured over many years. Unless that value system is examined periodically and defined in relation to its current context, something may get lost. We may find ourselves relying upon platitudes that perhaps were adequate ten or twenty years ago but that do not address some of the needs of this era. One of the things we're attempting to do today is to have a dialogue specifically about volunteerism to meet today's needs in the field of cultural arts in this nation. I've asked each of the panelists to think about the sociological trends in our nation today, things that are happening politically, anything in American society today that is having an effect on volunteerism and volunteer management in the field of cultural arts.

Betty Jane Gerber: I think the economic situation in this country is going to require that all people who are involved in the arts will have to become better trained and more interested in creative management. The discussions on Capitol Hill that have to do with reducing the deficit will mean that programs that have been available to give grants are not going to be available. This is going to put an enormous responsibility on trustees and other volunteers to come up with creative solutions to fill the vacuum. I believe it can be done because American volunteers are creative enough to turn potential problems into opportunities and come up with solutions to crises.

Roundtable: Perspectives on Volunteers

Milton Rhodes: My thought is on tax reform and how to take advantage of the new privileges that are going to be available for individuals who volunteer. We haven't developed all those advantages yet as volunteers, but I think over the next few years we will. The Independent Sector says that volunteerism will grow from 3.5 hours per week, which is what Americans now average, to 5 hours per week by 1991. I feel that if people get active in organizations, they eventually will support the organizations financially. This is something I think the American people are going to be called on to do more of because of what was said about economic conditions.

The Urban Institute says that in the last five years, we have had \$24 billion cut out of the nonprofit sector. With tax reform, we've lost another \$12 billion out of the \$79 billion that has been given to nonprofits (in 1985 dollars). It is imperative that we find more ways for volunteers to reach their potential and also find new loopholes that may be put into the next tax reform act in June so that we can spur on volunteers.

Minette Cooper: I think that we also have different lifestyles that are going to encourage people at both ends of the spectrum to help us. Senior adults now live longer, have better health, have more free time and more money. They are available, and they often have outstanding managerial skills. They also have real interests that have been tested through a lifetime, and they are marvelous volunteers. We have to find out what types of jobs they want and provide the transportation to get them to those jobs. On the other hand, we have a group of youngsters that has been raised in an era in which the arts have become part of the education of much of our population. Many young people are interested in the arts and are willing to give some time. Their time and financial resources are limited, but, given an interesting and exciting project with limited responsibility, we have an enormous wealth of young people available.

Phyllis Mills: You bring up the need to have the right job for the right person. It is very important in volunteerism to put people into the right slots. Around Lincoln Center, the audiences are older, not younger, and that is a great concern. Maybe the best way to get young people involved is to bring them into the organizations as volunteers, and then hopefully they will become audiences. We see a graying of our audiences that is disturbing. We would like to reverse this.

Minette Cooper: We did a demographic study at the Virginia Symphony and learned that 55 percent of our population was over 64. We began to aim our marketing at the "yuppie" population. We started with younger volunteers doing things of interest to them. We put our advertisements on television. We went to a festival called TGIF, which is a downtown

gathering for the under-40 business population. We've been deliberately aiming the marketing at "yuppies" and trying to get them involved both in attending performances and in volunteering.

Winifred Brown: I'd like to raise another question. I read a book, *From the Top Down*, by Susan Ellis. She says that too often, when we talk about volunteerism, we talk in terms of money. If we didn't need money, what would be our selling points for volunteers? Suppose we had all the money we needed to meet current needs, to do everything in the arts we wanted to do. Would we still need volunteers? And if so, what would we do with them?

Minette Cooper: In European countries, the arts are state supported, and they don't use many volunteers. We have a NATO group from Europe that comes to Norfolk each year. They're very interested in the concept of volunteering and frequently will take some of our ideas home.

Winifred Brown: Do you mean that we really would not need volunteers if we did it the European way and were heavily supported by the government?

Phyllis Mills: I certainly hope that would not be the case, but it may appear that way when you look at volunteers in different sizes of symphonies across the country. The smaller orchestras use many more volunteers in far more creative and exciting positions than the larger orchestras who can afford staff to do the work. It may seem that if management can afford to pay, they would rather have a staff person than a volunteer. What is crucial here, however, is that volunteers bring a different perspective to the whole organization. They join us by choice and are not working because they have to earn a salary. They have broad contacts in the communities and therefore can offer that diversity of insight.

Betty Jane Gerber: In our country today, cultural pluralism is becoming more and more a factor in decisionmaking. This is going to have an enormous impact in the next 20 to 30 years, and we see volunteers adding perspective and broadening the goal-setting horizons of management. Institutions should use their volunteers in setting goals that will bring them more up to date and help them move ahead for the future.

Milton Rhodes: I think Americans get involved in issues no matter what is happening internally in organizations, no matter whether the staff is there or not. From the beginning, Americans have wanted to get involved in issues. For example, orchestras were formed very early by conductors or musicians who wanted to perform. Local arts groups form because there is a person or a group of people in the community who are artists or volunteers. The issue of the day for the arts is: What's going to get

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people more active and involved? And we, as arts professionals and arts volunteers, must build alliances to articulate issue-oriented causes that we all experience in our neighborhood arts programs, government arts programs, or corporate cause-related marketing of arts programs. We have to make it critical for people to want to get involved in these issues. I think we have to focus around the issues of the day, and then work—whether volunteer or paid—will develop to fill the void.

Minette Cooper: One of the things that seems to be happening all over our country is that a great number of emerging arts organizations are being founded to foster a particular ethnic group or cultural heritage. They are attracting a new group of arts volunteers that is often very capable. They are the kind of people who could be staff members if there were money but aren't because there isn't money at this early stage of development. Once some of these people have established their own arts agencies, they form networks with others. They become part of the boards of established organizations. The focus of their volunteerism is sharing their cultural heritage with the rest of us. I think that's a very significant event in volunteerism in this country.

Winifred Brown: Let's look for a moment at this question. Some say that different motivations drive volunteers to come into the cultural field than attract them to social agencies. Do you think this is true?

Betty Jane Gerber: Could I start with similarities? The most positive aspects of all the things we do are the things that draw us together. I recently heard the comment that a "widespread tradition of organized neighborliness" was dictated by hardship in our emerging country. This was something that brought people into volunteering, and I think that there still is a need today that makes us a nation of joiners. Our ancestors came from societies with rigid structures that were very formalized. They suddenly had to find new ways of extending their families, and they formed self-help communities. Today there is a new situation in this country—and probably in the world—in which "high technology" begins to require "high touch" in the human experience. We need to experience situations in which we can be much more involved with each other. Common interests and similarities among volunteers increase participation to a considerable extent.

Winifred Brown: Maybe that hands-on approach is an important rationale for having volunteers regardless of the dollars, because that personal experience gives them a deeper feeling for the arts and a chance to become more involved.

Betty Jane Gerber: High technology does make one look more deeply into the arts for just that reason.

Winifred Brown: Minette, how does this fit in with your previous comment about the emerging services? What's attracting people to volunteer in those areas?

Minette Cooper: The fact that the arts are so important to all of these people. This is the first culture in Western civilization in which humans have segregated the arts from regular life. The arts used to be an integral part of religion, and everybody participated in them all the time. They were not something that you only experienced when you went to a concert hall. The arts were part of people's culture in their homeland, a necessary part of everyday life. In the last century or so, we have created a situation where the arts are separate. People are now beginning to change this. There are more and more small organizations where you can go to throw a clay pot or perform as an amateur musician and more and more opportunities to experience performances of art from other cultures. It seems to be critically important to many people to get back into the participatory forms of the arts which we all need.

Winifred Brown: You're saying that active participation is one of the major things that will draw people to the arts, but I think you're also saying that it is a fundamental need of human nature to participate in the arts. If that is true, there ought to be a tremendous pool of people volunteering for the arts, and it ought to be as easy to recruit for the arts as it is for any social service agency.

Minette Cooper: Or easier.

Winifred Brown: Or easier, which is an interesting statement. Do you all agree with that?

All: Yes.

Minette Cooper: It seems to me that many people who used to join boards of directors as the policymakers joined those boards that carried a considerable amount of prestige and control of large quantities of money. Those organizations were universities, hospitals, and major arts organizations with physical structures. The men especially felt that this was where they had both expertise and interest. As times have changed, more arts organizations have become structured. They've become major, they control significant quantities of money, and they affect what goes on in the community. The arts agencies have become more intriguing for business people.

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Simultaneously, I think we have begun to develop an artistically literate society. Many people have learned enough about the arts to become more actively involved. People who before were only interested in the community fund now support artistic endeavors. As they have joined, other people who simply want to be with these people have come along.

So, we've had three reasons for people joining arts boards and volunteering in the arts. First, we can interest those who sense that the arts have become big business and are significant in the community. Second, people join to be with the movers and shakers; and third, people who are literate in the arts support us because the arts are so important to their lives that they want to ensure that the arts stay alive in their communities.

Winifred Brown: If that is true, then what do you feel are the most effective ways to attract people into the arts program?

Milton Rhodes: The recent study done by Yankelovich on charitable behavior of Americans reported that the reason Americans don't give more and volunteer more is because they are not asked. Generally, whenever I have asked, most people will help in some way. I came into this meeting feeling that there wasn't a great deal of difference between those who volunteer for the arts and those who might support health and education. But as we have been talking, I started thinking about the link between health agencies and the fear of dying or the devotion of a person to a cause because a relative died of that disease. That makes the health agencies' case more crucial. We have to link the arts to this kind of necessity in the mind of the public. If we can tie into education that is making news or to current issues that attract public attention, we can somehow pull on the heartstrings of people to get out and support the organizations.

Winifred Brown: There are those who say that the arts form the soul of the community. It is the expression of the humanity of the community that makes one community different from another. The arts are what help to shape the communities, so we do have a big challenge to recruit volunteers. We also hear that it is difficult to maintain volunteers. What are the roles and responsibilities of boards of trustees toward service volunteers?

Betty Jane Gerber: One thing boards of trustees have to take into consideration is setting high standards of professionalism, not only for the staff but for the volunteers themselves. I feel that this is what gives the participants in any kind of arts organization their sense of worth. Professionalism, whether one is paid or unpaid, is essential to one's sense of respect. The boards have a great responsibility to see that high standards are set to encourage professionalism and respect.

Winifred Brown: Would you indicate some of the standards that ought to be met? Phyllis said that when she first started, finding challenging volunteer jobs was terribly important. Part of the problem may be that we recruit without a clear picture of what volunteers will do after they have been recruited. Frequently, the kind of job assigned isn't what the volunteer expected to be doing.

Minette Cooper: I often have a pretty clear idea of what I'm trying to recruit someone for, but too often I have found that the job doesn't suit the person I'm going after. It can only work if the person doing the recruiting revises the job. For example, we might split the job in half and make two jobs out of it. Then we can accommodate the time available from the volunteers we are trying to recruit.

Winifred Brown: Milton said earlier that the Independent Sector has a new objective to try to increase the number of hours of each volunteer from 3.5 to 5 hours per week. If we are going to do this, we're going to need to have more types of jobs. I think if we talked to volunteer center directors across the country who are trying to find the volunteers to meet various organizations' needs, we would hear that the job descriptions received are somewhat limited in imagination. If we're going to increase volunteerism to 5 hours a week and look for new sources of people, then we have to ask what makes that job interesting and important.

Phyllis Mills: Every job can be made important because different people have different interests. I sometimes fear that too much importance is attached to the people who raise a lot of money or run the biggest benefit. Then there's the lady who will come three days a week and work from 9 to 5 stuffing envelopes or standing behind the ticket counter. These people are very important, too, and I'm afraid we're forgetting them in trying to be so professional. We've got all these job descriptions, which are necessary for the upper echelon, but we can't lose that lower echelon of people, and we must make them feel their contributions are important. We must not make them feel that the leadership is elite, which is a big problem in some arts organizations where competition exists between classes of volunteers.

Betty Jane Gerber: Attention to job descriptions from top to bottom can be essential in making people feel important. When I say top to bottom, I am not referring to a hierarchy. The importance of a job description is that when individuals come in, those persons are given some idea of what they're going to do, how they're going to go about it, and what sort of support they're going to get from the institution. It is essential that jobs be clearly defined because otherwise it's very difficult to evaluate

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whether you're meeting any of the goals you have set. Job descriptions and the resulting evaluations provide a sense of status and worth and help make people feel that they're important.

Milton Rhodes: I once worked for an organization that was over-organized. There were too many job descriptions, and the board wasn't allowed flexibility in determining their reasons for being. No one said, "I also need your brain." If I were the director of a local ethnic arts center, before I could even consider writing a job description, I would have to recruit some people for my board. I'm not very clear about what I'm doing, but I have decided to form a company or a neighborhood arts center or something like that, and I found out that I need a board to get my 501(c)(3) status. I don't know what I want that board to do. In a way, I have to say to those people, "Come wing it with me. Let's get this thing going." That is what, in so many cases today, creates excitement and attracts new people to get involved in our creative activities.

Phyllis Mills: The most exciting project I've ever done as a volunteer was creating the Radiothon at the New York Philharmonic. We had no idea of what we were going to do. Now, it's very organized, and it runs so efficiently. During the first one, though, we had a group that was just out there winging it, and we had a lot of fun. There is that very special excitement that you can get over creating something.

Betty Jane Gerber: Creating a new organization or project really does require a lot of flexibility during the unstructured, creative period, but then you have to move on. You have to set some goals and a sense of structure at that point. It is also good to allow people to participate at this stage who have not had broad experience in board structures and dynamics in order that they be trained in this type of situation.

Winifred Brown: We're talking about something fundamental. One of the problems is maintaining that spirit of creativity and dynamic participation when the organization has become large and begins to have a history. Those organizations that have survived and been successful have done it because they have been able to maintain that spirit. I'd like to go back to feeling important as a volunteer. How does somebody feel important, or how does the job feel important if it is very structured? How do we keep that spirit of creativity alive, and what can the organization do to make that happen?

Minette Cooper: It seems to me that you have to have people in leadership roles who have very high energy levels. This creates a sense of enthusiasm, if not excitement. All work has value if people believe that do-

ing it is critical to the success of the organization. In addition, you need to recruit people for both paid and unpaid work who have real enthusiasm for whatever the job is.

Phyllis Mills: To keep the excitement going in a volunteer structure when we reorganized the volunteer program at the New York Philharmonic, we blended the Junior Committee with the old Auxiliary Board to form the Volunteer Council. I predict that in twenty years or sooner, there will be a junior group established to serve the needs of that time. You've got to make sure you can deal with what's happening at the time. We allow creative change in our structure because nothing ever is set in stone. That helps keep the excitement going.

Betty Jane Gerber: When we speak of creative planning and management, I think of the Children's Museum in Boston where they work with counselors in high schools and probation officers in a program called "Kids at Risk." These children are often very intelligent, but they have not yet learned to focus their energies and abilities. They have brought these kids to the museum, and they have become wonderful ambassadors to the rest of the community for that museum. This has drawn in enormous numbers of other young people, and these "kids at risk" have moved into the larger planning stages of that museum.

Winifred Brown: You are providing another answer to an earlier question about what volunteers can do even if we have all the money we need. One of the major things they can do is be ambassadors. They can speak for the organization, and others will listen because they have no personal stake. They are not earning a salary. They are there because of their concern. People listen to volunteers.

I would like to focus on the real responsibilities of a board of directors to the large work force of volunteers within an organization. In many cultural institutions, for instance, there may be a board of directors of fifty people, but there are possibly hundreds of service volunteers working in the institution. In that sense, they are personnel just as paid staff are personnel, and the board has a responsibility for them. What are some of the direct responsibilities a board of directors has for these personnel?

Betty Jane Gerber: One responsibility the board has is to help protect the volunteers and staff in a very litigious society. An organization today can get into trouble if the board is not aware of various aspects of the law and insurance. I'd like to recommend two books—*Aspects to Protecting Volunteers*, which resulted from an Arts and Business Council project, and *The Responsibilities of a Charity Volunteer Board*, published by the

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Better Business Bureau. Everyone who is involved in 501(c)(3) organizations should be familiar with this book because the Better Business Bureau can speak from experience as an organization that advises people who are donating funds to nonprofits. It also assesses whether an organization is actually carrying out its mission. Another good resource is *Museum Trusteeship* by Gordon Uhlberg, published by the American Association of Museums Trustee Committee. It is one of the most informative books for training boards about these responsibilities.

Winifred Brown: VOLUNTEER, The National Center has available a volunteer readership catalogue listing all the publications they feel are of interest on volunteerism, whether it be board management, volunteer administration, the role of the volunteer, or general volunteerism. This listing offers professionals and volunteers a broad spectrum of resources.

Betty Jane Gerber: The Arts and Business Council (ABC) has volunteer lawyers and accountants available to help you understand what your liabilities are and how you can best protect the people that you have to work with. Presently, sixty-six centers are being established around the country by the ABC to advise artists and organizations.

Milton Rhodes: Let me mention one other group, the Volunteer Lawyers for the Arts. They have approximately 1,600 lawyers who belong to forty chapters around the country that help arts groups in contract negotiations, real estate issues, and so on. They also have a very good pamphlet on incorporating as a nonprofit organization and the kinds of protection you need to have as a nonprofit arts organization.

Another area of board responsibility I'd like to discuss is insurance. From what I understand, liability coverage has doubled for arts organizations in the last two years. That means if you were paying \$3,000 for a \$1,000,000 policy for your small arts organization, you are now probably paying twice that, and you need \$5,000,000 in coverage because the liability cases have increased substantially over the last year or so. A number of states—Oklahoma was the leading one—have taken action to limit the liabilities of boards of directors of nonprofit organizations to \$100,000. Also, volunteers who might be hurt stumbling in the park owned by the museum would be covered to a limit of \$100,000.

Phyllis Mills: Most of the boards I've been on have decided not to take out as much insurance as they would like because they cannot afford it.

Winifred Brown: Insurance is an extremely technical issue. Boards should be informed about those aspects of insurance that affect volunteers just as they have to be informed about other legal matters, in-

cluding current legislation before the city, state, and Federal governments, that affect volunteers. I am thinking about tax deductions and a whole range of issues.

How do we protect a volunteer from making a mistake—from becoming embarrassed or from getting involved in something he or she shouldn't be involved in? An example would be a volunteer overstepping the lines defined as a staff role, perhaps because the volunteer didn't understand the divisions of responsibility. How is the board of directors responsible to protect the volunteers from becoming embarrassed about making a mistake in an unclearly defined area, then perhaps leaving out of frustration?

Milton Rhodes: This will be controversial, but I'm going to say it because I've heard it from staff members. In my position as a volunteer for many years on the American Council for the Arts board, one of the things people say is "blame it on the staff." That's a common thing to do. We constantly try to do that as volunteers, and we often don't realize we're doing it. The staff becomes our scapegoat when we haven't taken the responsibility to define roles ourselves.

Betty Jane Gerber: At the same time, the staff likes to say, "blame it on a volunteer." To protect volunteers in this sense, the board should have a very good oversight of the training of volunteers.

Minette Cooper: You're absolutely right. Museum volunteers are an example, because they are so much better trained than most other arts volunteers. Museum training for docents is very specific.

Milton Rhodes: The reporting systems and the bureaucracy should protect us from embarrassing ourselves. Generally, the guilds or the women's organizations or the men's organizations should have some system to communicate with the board that's ultimately responsible for the financial health and viability of the organization. Frequently, I've seen volunteer organizations who were disenfranchised by the management of the museum or orchestra set up a separate 501(c)(3) outside the organization to determine their own future. They wanted to decide if they were going to give to the organization and determine for themselves how much to give.

Winifred Brown: What is the responsibility of a board of directors to ensure that both paid and unpaid people are representing us adequately in the community?

Betty Jane Gerber: I would like to support the business of training. Once we've recruited, we have the job of training.

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Winifred Brown: But what do we do if we've got one person on staff part time, and that person doesn't have the time to train volunteers?

Betty Jane Gerber: If the professional staff does not have the time for training, volunteers may have to set up their own structure and training programs. If the board of directors is involved, they can see that training is carried out. I would hope that the professional staff would be involved in some way, but reality often works against that. We can begin to think of resources in community colleges or community organizations such as the Junior League as sources of training assistance.

Winifred Brown: If a paid staff member can do only one thing in relation to training, what should it be?

Milton Rhodes: My feeling is that the staff has a clear sense of where the organization wants to go, and that I, as professional staff, should sit down with that new board member or volunteer and communicate what we're trying to do. I would do my own orientation if I couldn't find anyone else to do it or did not have a formal volunteer organization to do the orientation session. More and more organizations seem to be trying to have an initial meeting, or the staff goes to the volunteer's office where they introduce the organization, its structure, its personnel, and its mission and talk about what this volunteer is going to be expected to do. In fact, more and more smaller organizations are doing this in a two-tiered form. Prospective board members are told what they will be expected to do before they join. Once they have agreed to join, they have a meeting with the other new people to learn about the organization. That is what I see as a two-tiered structure. The service volunteers as opposed to board volunteers almost never get that preliminary call unless they have a friend who is recruiting them, but they very often do have the opportunity of having some kind of initial meeting as a group.

The training is only, shall we say, 50 percent effective because time is so short. Docents in museums have long training periods. Some of my friends go to sessions for twenty weeks before they become qualified docents. Most other organizations that utilize service volunteers, however, have a very short period of time to share information. A lot of my friends have said to me, "Oh, I've been a member of this organization now for five years, and I finally understand what it does." That means five years in which this person could have created all kinds of problems.

Phyllis Mills: There was no orientation when I became a volunteer at the Philharmonic. There was no orientation at the board level, either, because I'd been around as a volunteer, which didn't mean I knew exactly what the board did. With the new board structure, there is an orienta-

tion, and, from feedback we get, we seem to have a very good program and a high percentage of members showing up for orientation. We also interview prospective members, but the orientation is more important than the interview.

Winifred Brown: Even in smaller organizations, orientation is important. Communication in the smaller organizations is often assumed. We are sure that everyone knows the important things we are doing at the moment. In a big organization, you are forced to structure, and communication should be better. In small organizations, you have to be even more careful because you assume people know things they may not know.

Betty Jane Gerber: Communication is absolutely essential. All the various levels of management and volunteers should be communicating in some manner. Channels need to be established and well tended because major problems arise when there is a lack of communication. It is a part of the volunteers' reward to be able to hear what the board and the staff and director are doing so they feel they are part of the organization's mission. They need to feel they are helping to accomplish these goals. I think that communication, whether it is a written newsletter or whatever, can have a salubrious effect.

Minette Cooper: One issue that hasn't been raised in the area of communication is that the staff member who has been or is currently a volunteer for other organizations seems to understand far better what the volunteers in his or her own organization are experiencing. The staff member who is not actively involved as a volunteer is often not as sensitive to volunteers. This means giving the staff member time to participate in other organizations. I have found that if staff members have never been volunteers, you can talk until you're blue in the face, and you really don't convince them of the validity of the professional perception of the volunteer.

Winifred Brown: Maybe that says something about the qualifications for hiring a person who is going to be the head of an organization in which there are a great many volunteers.

Milton Rhodes: I gave a talk last week in Illinois to a group of staff members from community arts councils throughout that state. I told them about the goal of the Independent Sector to have everyone volunteer five hours per week and told them, "That includes all of you—five hours per week outside of your paid arts job." The immediate reaction was, "We already spend 60–80 hours in our jobs. We are a different kind of volunteer because our jobs are underpaid and our hours of involve-

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ment in a community are much more extensive than others. We think a lot of our work is actually volunteer." I said, "Sorry, you're just like the rest of society. You may work a few more hours, and you may be underpaid, but you still have to spend time volunteering in the community if you're going to keep in touch with what people on your boards and volunteer organizations are all about and are going through." Most of our board volunteers are CEOs who also have volunteer positions, and they work their buns off. You may want to delete that comment, but I feel very strongly about the point. I don't think arts professionals are any different just because they work 80 hours per week. They have to look for five hours of volunteer time to give.

Winifred Brown: How do you think we build mutual respect and admiration from the point of view of the volunteer to the staff and the staff to the volunteer? One can't get along without the other.

Phyllis Mills: Communication is essential. If a volunteer is working on a public relations project with a public relations person on staff, they hopefully build respect for each other. If volunteers are separate from staff, you have trouble. The volunteers go off and do things on their own. It ends up with no mutual understanding.

Minette Cooper: We must have frank and open exchange. Someone who is devious can unglue a whole organization.

Winifred Brown: Absolutely. You need the top staff and top volunteer management to say, "I'm telling you the way I see it, and if you don't agree with me, let's hash it out." The worst scenario is to bury the disagreement. It just rears up again.

Phyllis Mills: Staff sometimes has a problem doing that. I used to argue with them when they'd complain to me about a volunteer. I would tell them, "You've got to talk to that person. The volunteer is a human being doing a job, and you must treat him or her that way. Otherwise, you're going to get more frustrated."

Winifred Brown: What are some other things that will build a sense of mutual respect?

Milton Rhodes: The one thing that always kept me active in nonprofits was having the director or the president of the board say, "I'm listening to you, and your opinion is important to me. Keep making those crazy suggestions. Maybe one of them will hit." The feedback you get from an organization is very important for a volunteer's feeling of being needed.

Betty Jane Gerber: And the board and staff should be able to appreciate criticism and see it as an opportunity to improve their performance all the way up and down the line.

Winifred Brown: We've been discussing how we can build a sense of mutual admiration and respect—the volunteer for the staff member and the staff member for the volunteer. We've also talked about the importance of communication and of people knowing what they are supposed to do. Are there some other key issues you want to discuss?

Betty Jane Gerber: Having been interested in volunteer advocacy, I'm going to bring up something that may rustle a few feathers. For quite some time, I have prepared a professional curriculum vita whether I'm paid or not. I see that whatever I do is professional. I think the professional staff can help their volunteers understand this by helping them develop their own curriculum vitae. It gives both paid and volunteer staff a sense of what they are accomplishing. If the volunteers should move on to paid jobs, they have something to show for what they've done. I think that a curriculum vita or a resume provides people with a sense of pride in their experience.

Minette Cooper: Perhaps even more so than pins and placards.

Betty Jane Gerber: Much more so because the important thing is that one's life is focused. One has set priorities and has seen to it that they are accomplished. It gives volunteers a true sense of accomplishment that a little piece of paper on the wall simply does not do.

Minette Cooper: I want to make a point about appreciation, which is almost the same. Appreciation means letting everybody know at the time that what they've done is significant, vital, and critical. That means training everybody on the staff to say "thank you" to the volunteers whenever they do something useful.

Phyllis Mills: Volunteers ought to thank the staff, too.

Minette Cooper: That's the other half of it. This past weekend we had an opening, and it was incredible. We had the best attendance we've ever had. I sent a few flowers to each staff member because they'd done something that was far beyond what we have been paying them to do. The sense of appreciation for every job done right and done with loving care is something we must say "thank you" for over and over again.

Winifred Brown: I want to reemphasize Phyllis' comment about thanking staff. It is demeaning to the person when there is an impression that staff will only do this because they get paid. It's as though we were saying

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that we don't believe in the organization; we're just doing it for the money. We want to demonstrate a partnership. We are sharing in our interest in the future of this organization.

Minette Cooper: Public recognition and appreciation also can be very helpful. If the organization has a bulletin board, we can highlight a staff member as well as a volunteer member so people do get public recognition for jobs that are done particularly well.

Winifred Brown: We also can give recognition by providing people with information. However, it's very important for people to understand—whether they are paid staff or volunteer staff—that certain things are appropriate for everybody to know and certain things are inappropriate for everyone to know. I'm thinking about personnel matters, for example. That's why you have a personnel committee. There are other things that, for legal or humanitarian reasons, are not everybody's property to discuss. This concept that some issues are confidential and only for senior management to discuss should be stated at the very beginning and should be part of the training. We need understanding and mutual respect for the fact that each member will treat certain discussions confidentially.

Milton Rhodes: I was thinking earlier that probably the most important committee of any group is the nominating committee. It's one of the things I think we ought to discuss for a minute or two. How do you choose the right nominating committee? Who does the asking? Is that done in a haphazard way?

Minette Cooper: Well, it shouldn't be haphazard. Every organization I know that's in trouble has had a nominating committee or a board development committee that has included some of the weaker people on the board. They tend to reinforce their own weakness in choosing prospective members. A strong nominating committee wants to have its peers on the board and will look for the very highest caliber person or the highest clout ratio they think they have any chance of getting onto that board. That is often the difference between an organization that continues in business and one that goes out of business.

Betty Jane Gerber: The chairman of that nominating committee should be part of the long-range planning committee of the organization. If the nominating committee does not know where that organization is going to go five years down the line, they will not know who they should be looking for to get them to that goal. It's very important that the nominating committee have a clear idea of exactly where the organization must go and choose their people accordingly.

Minette Cooper: I think the nominating committee also is in a position to have a strong policy on the activities and expectations of board members. I've seen nominating committees force a board to have a close look at current policies and put them into good order.

Winifred Brown: If a person is going to be asked, it's more than saying "Will you do it?" What other things do you want to say to strike at their pride?

Milton Rhodes: "I need your mind." That is the best one of all. "I need your brains. I'm really in trouble here." Or, "I need your help on this issue because it's legal, or because it's financial, or it's how to deal with communications with the public, or whatever. Your mind is exceptional in this area, and it's needed in this organization." That gets more people than anything else I know of.

Winifred Brown: But what about the person you don't know that much about? The person who comes into a volunteer center may have no idea what skills he or she has that would relate to a volunteer assignment. If they understand that something you are doing could be valuable to them, then there is a connection. You can't recruit people unless you've thought about what kind of person you want.

Minette Cooper: Besides the fact that you want them to help with some specific task, you need to have an idea of how long the task is going to take and how much time they have to give you. You must have some time parameters to offer them. Most people will join a task force that has a beginning, a middle, and an end.

Betty Jane Gerber: I'd like to discuss some other aspects of what I consider to be creative management. At this point in time, there are a lot of young families who don't have help at home but who would like to be involved in the arts. Some museums are experimenting with programs where they involve the parent *and* child as volunteers. You will often see a parent and a group of children participating in an educational experience.

We also haven't spoken about recruiting among the handicapped. This is an enormous field of people who really would like to be involved in the arts. Creative management must involve them in cultural activities because they bring a very exciting perspective. I'm thinking in particular about programs developed by the Friends in Arts for the American Council of the Blind. Even if you are a sighted person, you begin to look at things differently when you understand this perspective. You begin to understand the art form on new levels.

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Minette Cooper: In conjunction with that, I think you absolutely have to have handicapped individuals on any committee that plans a program for the handicapped. We discovered that we needed to be quite careful of the people we chose. A couple of years ago, we created a panel to help with grant choices, and we made sure we had handicapped persons on it. One man who is retarded was put on the committee. He said to us, "I really don't know why I'm here." He had been recommended to us, but he really felt like an outsider to that process.

Betty Jane Gerber: I think he was being asked to function in the wrong capacity when he was recruited. You have to ask the right questions before recruiting someone. You don't ask somebody who is not experienced in something. You want to play to their strengths. If it's a person who is mentally retarded or handicapped in some other way, he or she has strengths that are important for us to identify.

Winifred Brown: We've been talking about special groups of people with special interests in connection with their roles in the organization. Let's talk for a minute about the role of the artist as a volunteer in our organizations. What are some of the special considerations that are unique to this field?

Milton Rhodes: One of the things our organization has been involved in is working with a group called the National Planning Committee on the Originating Arts. Eighteen different organizations are represented, and half of the representatives are artists. They are very concerned about how institutions in America are taking advantage of the originating artists and not involving them in the decisions that often affect them. These people are composers, playwrights, writers, painters, craftsmen, and other artistic creators. One of the suggestions they've made is that a number of them should be included in the decisionmaking of every organization in the arts field.

There are many reasons arts institutions have gotten away from having artists on boards, although in the early days, when they were emerging groups, there were many more originating artists and individuals who were involved. As arts organizations became more complex and bureaucratic and met once or twice a month, the artists didn't seem to be interested, and they weren't asked to participate again. One of the things ACA would be a proponent for would be having more artists involved in art decisionmaking that affects them. That is where the energy and excitement for the field come from.

Minette Cooper: Again, I think we're back to choosing the right person for the right job. When our commission on the arts and humanities was

created, we wanted some creative artists on the commission. It is my job to recruit those people. To say we had artists on the board was fine, but if they didn't come to the meetings and help with the decisionmaking process, they put an intolerable burden on the rest of us. What I discovered is that many people who are really creative do not want to attend meetings once or twice a month. I had to find the creative person who was willing to show up for the commission meetings as well as the sub-committee meetings and really participate. The ones we selected have done that, and they are marvelous voices for the creative community.

I am opposed, however, to having members of an orchestra on the symphony board. The board has to deal with contract issues that would put the orchestra members in direct conflict of interest and create a problem with confidentiality. I am very much in favor, however, of including members of the orchestra on every committee that they care to join.

Phyllis Mills: At the New York Philharmonic, we don't have members of the orchestra on the board, but I agree that they certainly should be involved in committees. It's always a concern whether to put them on a committee or not. You want them to know what's going on in the organization, but sometimes you have complex situations where you have to ask them or the staff to leave. Then they really get paranoid that something horrible is going to happen. The board members do not participate on a lot of the orchestra's committees because some problems have to be worked out within the orchestra itself. There also are some committees that should be composed of musicians and board members. How you mold these relationships is a very delicate situation.

Milton Rhodes: The nominating committee has to do as good a job recruiting artists as they do every other member of the board. You look for those William Schumans or Robert Wards—whatever is a good representative of the artists in your community. These people are very difficult to find because many artists become tunneled into their own media and contacts. The artists often won't have that broad perspective you seek from other board members. The artist will say back to you, "You don't do that with a lawyer." Do you get a lawyer with broad interests or a special interest lawyer? Do you get a general communications person or a person who specializes in cause-related marketing? We have to balance that out. I would say making that choice is the most important decision. I think artists would like to be the majority of the board. The director or chairman of the board has to weigh all the needs within the organization and get good volunteers to do the work. The basic point is that some people should represent the artists' point of view. This is needed to give the board an artistic vision beyond immediate day-to-day work.

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Minette Cooper: Many artists don't want to give that much time because they feel their time should be spent creating. They don't want to come to committee meetings where something gets hashed and rehashed.

Milton Rhodes: I agree with that. But they would like to be chosen with the same care and attention we give to other volunteer positions. Many of the artists today want to be part of society unlike in the past when they were weirdos, kooks, and so on. Today, I think many artists are living in mainstream America in places where they have just started arts programs. They're trying to develop community interest in the arts.

Betty Jane Gerber: One very good way to utilize artists' interests is on advisory boards where they can reflect a variety of creative perspectives. They can bring a vision of what they would like to see the organization pursue without having the fiduciary and management responsibilities of board members. A lot of museums are choosing artistic advisory boards with specific areas of expertise in order to get input once or twice a year without requiring the members to satisfy quorums and all the other things that have to be met in more structured situations.

Phyllis Mills: Some musicians can be on boards of other organizations. A number of Philharmonic members are on other boards. We have a member of the Juilliard Quartet on our board, so we have the artists' view without the conflict of interest problem.

Winifred Brown: Is the case of a symphony, in which the board is the employer of the orchestra, related to the issue of staff members being on a board of directors?

Minette Cooper: Yes. When you're negotiating the contract, the musicians are in direct conflict with the whole situation.

Winifred Brown: Maybe you are stating a basic principle that the artists' point of view ought to be reflected, but formal membership of orchestra members on their own board is a conflict of interest.

Minette Cooper: I would like to make a point about emerging organizations. Some of the public has to be involved in an organization that comes to a public granting organization and says, "We think this is really valuable. Please support it." Therefore, a new organization that has only artists on its board is almost unfundable because it cannot prove that the community wants it to exist.

Winifred Brown: Networking is important for any organization. We should get as many supporters as possible. That leads us quite naturally to the next question—When is it important to call on the expertise and

competence of a professional in the field of volunteer administration? What are the competencies we're looking for, and what are the reasons for paying a professional? What does a good volunteer administrator do, and why do you need one?

Milton Rhodes: My first criterion would be that he or she needs to be a group person. They should enjoy listening to other people and working with them.

Minette Cooper: They should not be the kind of people that hog the spotlight.

Milton Rhodes: . . . and do everything themselves.

Winifred Brown: Those are important human qualities. What kinds of skills are required for the person you are hiring as a manager or an administrator? The Harvard School of Business Administration defines a manager as a person who achieves the goals of the organization through people. If that is true, how does it reflect on this group, and what particular skills does that volunteer manager have?

Minette Cooper: I must say that one of the things that has struck me has been that some of the best corporate managers are dreadful volunteer managers. In their businesses, they are accustomed to assigning tasks, evaluating what gets done, and expecting it all to be done.

Milton Rhodes: Yes, because their staff members are paid to do it. When you have a volunteer who has a personal crisis that takes precedence over the volunteer task, the job may not get done. The project may be left in chaos. This is a problem for which I don't have the solution.

Phyllis Mills: The professional manager who has been a volunteer will understand that type of thing, which gets back to our earlier point about everybody volunteering. The volunteers must also understand that their commitment can't be taken lightly. There should be safeguards so that other volunteers or staff can handle any project that is critical to the overall organization. Sometimes, though, commitment of volunteers is even stronger than that of staff. They come in when they're sick because it's very important to them that their task be done.

The volunteer coordinator is a real link between staff and the volunteers, making sure that they all work together and understand each other. The coordinator shouldn't have too much of an ego—his or her reward should come from the fact that the projects are being run in the best possible way. The coordinator has to have a lot of input, but the volunteers have to get all the credit. That is difficult to achieve all the time. I

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think it's very important for management to recognize what the coordinator is doing. It would be very frustrating for a director of volunteer services to see letters from management about how wonderful the volunteers are without some thanks for the coordinator.

Winifred Brown: One of the problems in this field is that many organizations don't realize there is an identifiable set of skills and functions for a volunteer administrator. These essentially are the basic skills of management. Volunteer administrators are deployers of volunteer "people power"; they see that the goals of the organization are met through people, specifically through the jobs assigned to the volunteers. Volunteers may be a shifting and impermanent staff, but they often are very dedicated to their assignments. The volunteer administrator should help the volunteers set goals that are directly tied to the organization's objectives and plan the ways they will be accomplished. The volunteer administrator should have easy access to the agency head and be considered on the same level as other department heads. If an administrator says, "We don't have much money, so why not let the volunteer director become a volunteer?" I say, "Fine, if you also are planning to let the director of personnel and the heads of the other departments be replaced with volunteers."

What we're talking about is competency. The fact is that in today's society, there are few people who have time to give to being a volunteer administrator who also have the qualifications. Even if you find somebody who is competent, qualified, and willing to give five days a week, the problem is that the organization stops budgeting for the position. When the volunteer administrator who is donating time leaves, you can't find another qualified person who can afford to give his or her time. It may take a year to find someone who can donate five days a week. In that time, you may lose your entire volunteer program.

Betty Jane Gerber: Another characteristic I think we should look for is a sense of enthusiasm and commitment to the organization. If you have a coordinator who is just doing the job to pay the bills, you're not going to attract people to donate time. You've got to have enthusiastic leaders whose sense of excitement will infuse the whole group with the spirit of commitment.

Winifred Brown: There's no question about that. I believe that organizations earn the commitment of people. You're not born with commitment to any particular cause or organization. It becomes an organization's responsibility to set up a training program and provide you with the kind of support system that will build that commitment. A vol-

unteer administrator should demonstrate the ability to transmit enthusiasm, which hopefully will translate into committed volunteers.

Minette Cooper: One quality I think is essential for the volunteer coordinator is an energy level high enough so that when a volunteer is not able to finish something, that person can get in and do the work. I've seen so-called volunteer coordinators who have let projects slide because they didn't have the energy to take over when necessary.

Winifred Brown: It also is the ability to know when to let the volunteer fail. There are times when a program should fail because the volunteer administrator can't do everything the volunteers ought to be doing and don't. Sometimes you do not let the volunteer fail because the program itself is so vital that others will be affected. A volunteer often needs to know, however, that when he or she did not come and didn't notify anybody, there was a serious negative outcome. If a volunteer thinks that every time he or she doesn't show up the volunteer administrator is going to do the job, that job won't seem very important. The volunteer director must know when to take over and when to let the project flounder.

Milton Rhodes: One characteristic that I've had to live with for almost twenty years is being very adaptable to who is in charge. Sometimes I've been in charge; other times they tell me how high to jump, and I'll do what I'm told. Volunteer administrators in arts organizations deal with a lot of creative types. Even though I would make the case that 99 percent of the time we are like all other nonprofit organizations in the world, we probably have more creative types than any other segment of society's nonprofit world.

Winifred Brown: To work with creative people, the volunteer administrator must know how to work with a variety of people and be flexible enough to do that. Also, the volunteer administrator needs to be knowledgeable about trends and how those trends are going to affect the organization and be able to communicate that.

If I were to pick one major activity of volunteer coordinators, it is the creativity and imagination to develop sound volunteer opportunities. Sometimes you ask a department director what is needed in the way of a volunteer, and it's almost a triggered response—a typist. There may be 100 things in that department that could be done by volunteers to expand the scope of the department and help in the realization of organizational objectives.

Creative managerial skill is something a volunteer administrator must have plus all the skills of a personnel director. It is a very professional position in a sometimes difficult but usually highly rewarding environment.

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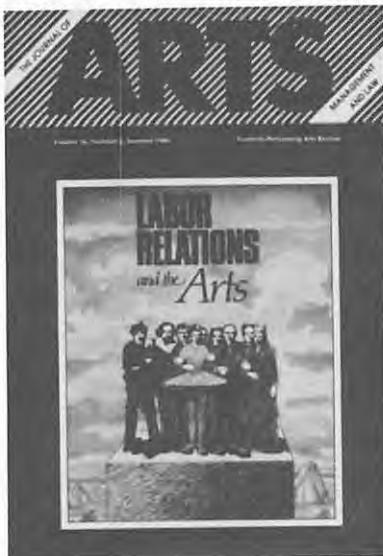
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