

MAXIMIZING VOLUNTEER ENGAGEMENT: A SNAPSHOT FOR EXECUTIVE DIRECTORS

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While executive directors of nonprofit organizations have grown accustomed to seeing their roles defined in terms of leveraging tight resources, maximizing community engagement, and advancing organizational growth and development, too few have made the connection between those goals and creating an effective system for volunteer engagement. We offer here a framework and guidance for executive directors interested in engaging volunteers to reach strategic goals in their organizations.

The Volunteer Involvement Framework™

In too many cases, volunteer engagement occurs as little more than an afterthought. An organization needs some work done and has few financial resources for the task; assuming volunteer labor to be essentially free, the organization elicits volunteers' help—only to be disappointed when, with poor oversight and unclear task specification, the volunteers fail to deliver as expected. Under this problematic approach to working with volunteers, nonprofit leaders make a number of mistakes, falsely assuming volunteers are “free” and that investments in volunteer programs cannot be justified. In fact, as with any process that connects organizations with mission-critical resources (e.g., fund development, marketing, etc.), volunteer engagement requires strategic investments of time, staffing, and infrastructure, a solid plan from which to operate, and resources—including a dedicated point-person—sufficient to complete the job. Additionally, volunteers, much like donors or other constituents, represent a group to be cultivated, with needs and motivations worthy of consideration. Approaching volunteer relations as a two-way process offers a gateway to a more engaged community, greater capacity for the nonprofit organization to achieve its mission, and more meaningful outcomes for the nonprofit and the volunteer alike. By developing a plan for diverse, multilayered volunteer-engagement experiences—built on the abilities and interests of volunteers as they align with the overriding mission and goals of the organization—nonprofits can tap into the nearly unlimited potential of today's volunteers.

Based on focus group input received from nonprofit leaders, the University of Texas' Volunteer Champions Initiative formulated The Volunteer Involvement Framework™ (see attachment). This tool helps executive directors assess their organizations' needs for volunteers, outlines issues to be considered, and provides options for achieving key organizational objectives and—ultimately, an agency's mission—through volunteer engagement. Built around contemporary themes in volunteer engagement and key motivations driving modern voluntarism,

The Volunteer Involvement Framework™ is a matrix that organizes information for decision-making purposes. The Framework enables nonprofit decision-makers to identify their current volunteer-engagement practices, examine additional service possibilities, and identify appropriate staffing and other management considerations; it also guides analysis, planning, and prioritizing on issues ranging from volunteer policy development to liability considerations. In short, the Framework provides a useful visual summary to organize strategic thinking about volunteer engagement and to help nonprofits examine the full range of options available for mobilizing volunteer support.

The Framework’s simple two-by-two matrix includes a horizontal “connection to service” component, indicative of the different primary motives for volunteers’ involvement, and a vertical “time for service” component, representing trends in volunteer availability. The two main motives for volunteering noted in the horizontal rows include: (1) the “affiliation or mission-oriented” volunteer, who gravitates to a service-opportunity in order *to associate*—with either the mission, purpose, or cause of the organization, or with the group or network of friends engaged in the service; and (2) the “skill-oriented” volunteer, who is more likely to express interest in or concern about the *type of work performed* as a volunteer. The vertical dimension of the matrix shows two types of time commitment common in volunteering: (1) a *short-term*, episodic, or temporary service commitment, and (2) an *ongoing*, often long-term, regular commitment. Within each typology, the volunteer brings a specific set of skills, abilities, and feelings about service to the organization or service experience.

Volunteer Motivations and Trends

The Volunteer Involvement Framework™ stems from trends unique to today’s multifaceted volunteer workforce. Not only do people serve for a multitude of reasons, contemporary volunteers serve in a variety of ways and with various expectations for the return on their investment of energy and time. (Some don’t even gravitate to the term “volunteer,” identifying themselves instead as interns, service learners, coaches, pro bono consultants, etc.) More than 61 million Americans volunteer regularly (Wing, Pollak, & Blackwood, 2008). A growing number of these are older teenagers motivated by the service-learning movement and retirees, including highly skilled Baby Boomers (Corporation for National and Community Service, 2006).

Although motives for volunteering are as varied as the volunteers themselves, numerous studies (Bureau of Labor Statistics, 2007; Independent Sector, 2001; Rehnborg, Fallon, & Hinerfeld, 2002) have found “being asked” to be a key driver for service. Other key drivers include affiliation with a cause or belief system (e.g., a sense of “wanting to give back”) and external affiliation inducements to volunteer, such as people seeking to volunteer to meet others or work with a group during “corporate days of service,” for example, or a youth volunteer initiatives. Additionally, a growing number of citizens say they volunteer to learn a new skill or to maintain skills while stepping out of the job market, temporarily or upon retirement (Musick & Wilson, 2008). From these motives, a range of trends in volunteerism have emerged—from day-long house-builds for episodic volunteers, to “adopt a school” programs for corporations, to skilled professionals lending their expertise in a variety of forums. By understanding these trends in service, executive directors can explore options within each of the quadrants of The Volunteer Involvement Framework™ for diverse volunteer experiences and create a corresponding plan for community engagement.

Developing a Vision for Volunteer Engagement

Identifying potential volunteers is only one step of a larger planning process that involves assessing how and where volunteers can fit within a nonprofit organization's larger mission and strategic goals. By beginning with an open mind about the nearly limitless potential of volunteers and the wide array of people available to offer service, nonprofit leaders can guide a planning process that constructs a compelling vision for community engagement. Including staff and board volunteers in the planning process, as well, enables these key stakeholders to explore the nuances of service, prepare for the organization's expanded reach through service volunteers, and to become inoculated against the resistance to volunteers that might otherwise prevail.

Plans for community involvement should be integrated within the existing strategic plan of a nonprofit organization, making explicit how volunteer involvement can ultimately help meet the mission and goals of the agency. Keeping this issue central in a community-engagement plan ensures that volunteer opportunities fit within the overall objectives of the organization and that volunteers themselves benefit from seeing how their service impacts mission.

Numerous tools exist to support vision-planning efforts. One especially tailored for volunteer-engagement planning is the Need Overlap Analysis in the Helping Process (NOAH, an online version of which is available at www.serviceladder.org/). This process captures the planning team's ideas about service opportunities for volunteer engagement: from that broad basis, the team can identify where volunteers fit within the organization and explore additional opportunities that meet the expectations of those serving. The outcome of such a process will help guide future efforts and serve as a touchstone for important decisions about volunteers. An action plan, including tangible goals and objectives for volunteer involvement, should flow naturally from the vision-planning and -defining process.

Making community-engagement plans operational requires selecting a point person to guide the volunteer-engagement effort, someone with the resources, time, and skills to be effective. Infrastructure and systems considerations must also take place during the planning stage, as the organization budgets for the staff time, facilities, supplies, and equipment required to move a volunteer program from vision to logistical reality. Deciding appropriate lines of communication, setting up databases, and determining appropriate methods for recruiting, screening, training, matching, retaining, and recognizing are all critical at this stage.

Also before the first wave of volunteers enter the building, nonprofits should weigh what professional development or guidance from the executive level will be necessary so that staff (and board members, too) can successfully integrate volunteers into their work. It may be helpful to benchmark other agencies' programs for volunteer involvement and explore opportunities for replication in volunteer-engagement systems.

Finally, based on the specific plan's goals and objectives, the nonprofit will set up metrics to evaluate the overall effectiveness of the community-engagement initiative. These metrics may include quantitative measures (e.g., number of volunteers, hours contributed, increased number of clients served with volunteers' assistance, etc.); qualitative measures (e.g., surveys of volunteers' experiences, stories about volunteers in the agency newsletter, exit interviews with volunteers); and financial measures (determinations of return on investment, valuation of volunteers' time, etc.)¹ Such metrics can and should become part of the executive director's dashboard for organizational progress—a reference point for discussions with staff, board updates, and annual reports.

¹ Resources for conducting volunteer valuation can be found online at www.rgkcenter.org/investigator

Maximizing the Volunteer Investment

Research on volunteer engagement suggests one decision in planning volunteer involvement may be paramount above all others in determining the effectiveness of a community-engagement effort: the issue of assigning staff resources and designing a management strategy for work with volunteers (Adalpe, et. al., 2006; Grantmaker Forum on Community and National Service, 2003; Rehnborg, et. al., 2002; Hager, 2004). Study after study has found that the more energy and resources nonprofits expend in community-engagement initiatives, the greater their return on the investment.

The level and extent of volunteer-engagement initiative (not the particular volunteer-staff ratio or volunteer service hours contributed) should drive staffing determinations. More intensive volunteer expectations require greater staff support and closer supervision, so each organization must examine its own goals, activities, and workload in volunteer engagement, before deciding volunteer management staffing levels. The Volunteer Involvement Framework™ grid in the attachment reflects management recommendations for each of the four quadrants. As indicated, many volunteer programs that involve a significant number of volunteers, volunteers who serve over a long period of time, or highly-skilled service opportunities frequently require resources for a part-time or full-time volunteer coordinator position.² Organizations that truly seek to maximize the contribution of volunteers frequently find an investment in volunteer management delivers gains equal to or surpassing the cost and effort of hiring for the position.

Minimizing Challenges, Embracing Opportunities

Even after planning and setting aside resources for volunteer programs, many nonprofit leaders harbor reservations about the challenges, liabilities, and logistical hurdles of intensive community-engagement efforts. The Volunteer Involvement Framework™ grid showcases some of the opportunities, challenges, and considerations for service projects within each of the four quadrants.

In terms of addressing concerns about risks, in particular, numerous resources—from insurance policies to support from intermediary organizations—exist to assist nonprofits in ensuring proper consideration of volunteer risk management and liability.³ Because risks should not be *overestimated*, nonprofit leaders should allow the complexity of the assigned task to dictate which risk-management measures are necessary, dropping any that add unnecessary bureaucracy and obstacles to service. Nonetheless, organizations must be diligent in addressing real potential risks (threats?). This can be accomplished through maintaining careful and thorough regulations, defining practices for orientation and training, and keeping up-to-date records and well-documented personnel files on volunteers, just as organizations do for staff and clients. A policies and procedures document for volunteers should outline pertinent guidelines and regulations (e.g., regarding volunteer/client contact, expectations for use of personal vehicles during service events, etc.). The nonprofit's lawyer and/or insurance carrier can review these guidelines as an extra precautionary measure.

Organizations developing volunteer-engagement initiatives should ensure that their database and record-keeping practices capture information not only to protect the nonprofit

² An excellent resource on volunteer management that includes sample job descriptions for the position can be found on Idealist.org in its Volunteer Management Resource Center section: <http://www.idealists.org/en/vmrc/index.html>

³ A particularly useful resource for nonprofit organizations is the Nonprofit Risk Management Center, based in Leesburg, Virginia, which offers a host of references and useful articles (<http://nonprofitrisk.org/library/articles/insurance052004.shtml>).

against undo exposure but also to provide the necessary data to evaluate the volunteer program's success.⁴ The information recorded about volunteers' service will depend not only on the requirements of the organization, but also that of the volunteer (e.g., those fulfilling service requirements) and the agency's other stakeholders (e.g., funders who accept volunteer service as part of a match). In each instance, the nonprofit may need to anticipate extra levels of recordkeeping to meet the reporting requirements of external stakeholders.

When volunteers have well-developed position descriptions, have been capably screened, oriented and trained for the position they fulfill, are given adequate staff support and recognition, and find their basic needs in providing service met, problems rarely arise. In those unusual instances when a volunteer simply does not fit with an organization, dismissal remains an option of last resort, just as it does with staff.⁵ Problem volunteers should not be tolerated, nor should the prospects of this problem deter organizations from engaging volunteers altogether.

Concluding Thoughts: Volunteers at the Forefront

Organizations benefit from expanding their conceptualization of volunteering to examine the complex interplay between the needs and goals of the organization or cause being served and the concerns and expectations of the people potentially delivering service. Organized on the dual axes of time and connection to service, The Volunteer Involvement Framework™ highlights the complexity as well as the richness of volunteers as a resource. Using the Framework, organizations can envision relations with a broad swath of potential volunteers: people who share the same goal—to make a difference—but see it from a number of distinct individual perspectives. As demonstrated here, making a difference can occur when one serves a cause he or she believes in, offers a valued skill, and/or acts as part of a network that holds some personal significance.

Responding to volunteers' specialized perspectives not only leads to more meaningful experiences for the volunteer but also creates opportunities for nonprofit leaders, who can capitalize on the cadre of community supporters developed from this base of people, who have come to know and value the nonprofit's work through volunteering. Consciously planning for effective volunteer engagement and providing resources to ensure positive volunteer involvement creates the foundation for a public-relations resource, grounded in the community and strategically tied to the organization's mission. As such, volunteers can provide a resource that, for many nonprofit organizations, proves essential to success.

⁴ For support in developing recordkeeping systems, see Ellis and Noyes' 2003 publication, *Proof Positive*.

⁵ Some excellent online resources providing detailed information about the process of dismissing volunteers are available at: <http://www.serviceleader.org/new/managers/2005/07/000270.php> and <http://www.casnet.org/program-management/volunteer-manage/fire.htm>

The Volunteer Involvement Framework™

		← CONNECTION TO SERVICE →	
		Affiliation Focus	Skills Focus
← TIME FOR SERVICE →	Short-term Episodic	<p style="text-align: center;"><u>Short Term Generalists</u></p> <p><u>Examples of Service:</u></p> <ul style="list-style-type: none"> • Corporate days of service with work teams • Weekend house-build by a local service club • Park clean-up event or trail maintenance • Work crew for annual event <p><u>Traits of Volunteers:</u></p> <ul style="list-style-type: none"> • Strong sense of connection to the work group, club, or organization. • Generally expects a well-organized event (materials and instructions immediately available to perform task, etc.). • May identify more with service group than the nonprofit being served. • May be meeting service requirement. • May have unrealistic/ naive expectations about their own ability to impact organization. <p><u>Management considerations:</u></p> <ul style="list-style-type: none"> • Manager should have project management skills, flexibility, accessibility, attention to detail, and ability to be spokesperson for organization. • Consider rotating management task among existing staff members who meet qualifications, but be sure at least one person is maintaining oversight and centralized records. <p><u>Opportunities for Organization:</u></p> <ul style="list-style-type: none"> • Ideal for accomplishing short-term, intensive work (e.g., to grounds or building). • Can help promote organization, spread message, build mailing list, advocate, etc. <p><u>Challenges:</u></p> <ul style="list-style-type: none"> • Not always well-suited to client-oriented service. • Considerable advance planning required for large-scale service projects. • Requires flexible schedule for staff leadership. <p><u>Liability:</u></p> <ul style="list-style-type: none"> • Dependent on service project selected; may be best to notify insurance carrier of the date. • May require an event rider on agency policy. 	<p style="text-align: center;"><u>Short Term Specialists</u></p> <p><u>Examples:</u></p> <ul style="list-style-type: none"> • A one-time audit of an organization's finances • A person opening his/her home for a fundraiser • A student interning as part of a degree requirement. <p><u>Traits of Volunteer:</u></p> <ul style="list-style-type: none"> • Seeks a service opportunity tailored specifically to volunteer's skill set, talent, or possession. • Expects mutually agreeable timing of service and peer-to-peer relationship within the organization (accountant to treasurer; event host to ED; etc.) • May prefer to think of self not as a "volunteer" but an intern, pro bono consultant, etc. <p><u>Management considerations:</u></p> <ul style="list-style-type: none"> • Manager should have strong human resources skills, job-sculpting expertise, flexibility and accessibility, and marketing skills to lead targeted recruitment effort that relates volunteers' tasks to organizational mission. • Volunteers should be treated as respected equals, not subordinates, with access to relevant information as the volunteer gains knowledge of the agency and prepares for the task. <p><u>Opportunities:</u></p> <ul style="list-style-type: none"> • Great way to secure important assistance not otherwise available. • Ideal training ground for more intensive service (e.g., committee, taskforce, or board work, etc.). <p><u>Challenges:</u></p> <ul style="list-style-type: none"> • Poorly handled service opportunity may harm reputation of organization. • Project preparation can be time-consuming, may require considerable upfront support. <p><u>Liability:</u></p> <ul style="list-style-type: none"> • Dependent on service project; determine need for appropriate background check.
	Long-term Ongoing	<p style="text-align: center;"><u>Long Term Generalist</u></p> <p><u>Examples of Service:</u></p> <ul style="list-style-type: none"> • Youth mentor • Environmental sustainability advocate • Hospice visitor • Park host or docent <p><u>Traits of Volunteers:</u></p> <ul style="list-style-type: none"> • Committed to the organization and/or the cause. • Often willing to perform any number of services, from stuffing envelopes to sophisticated services. • Appreciates regular recognition, both formal and informal. • In addition to strong motivations for service, may well be key donor <p><u>Management considerations:</u></p> <ul style="list-style-type: none"> • These volunteers require a comprehensive volunteer infrastructure and a dedicated staff person with not less than 20 hours per week dedicated to working with volunteers. • Program should have budget to cover necessary expenses and regular recognition. • Manager should possess strong interpersonal and organizational skills; continuity of leadership is helpful. <p><u>Opportunities:</u></p> <ul style="list-style-type: none"> • Strong mission-based, consequential outcomes likely from these committed volunteers. • Capable, informed advocates for organization. <p><u>Challenges:</u></p> <ul style="list-style-type: none"> • Effective implementation time-consuming and complex, requiring ongoing oversight. • Staff buy-in essential. • Volunteers need to be given a voice in organization's operations. <p><u>Liability:</u></p> <ul style="list-style-type: none"> • Check requirements for appropriate background checks. Should be performed if volunteer works with vulnerable clients. • Should carry some form of liability policy. 	<p style="text-align: center;"><u>Long Term Specialist</u></p> <p><u>Examples of Service:</u></p> <ul style="list-style-type: none"> • Pro bono legal counsel • Volunteer fire fighting • Loaned executive • Board member <p><u>Traits of Volunteers:</u></p> <ul style="list-style-type: none"> • Committed and wants to contribute through the skills they can offer to the cause or organization. • Often expects volunteer management that reflects the cultural norms of the given specialty or skill. • May have historical ties to the organization or cause and/or may have a family member (or self) who has benefited from the services of organization. • Expects staff support, assistance with resources necessary to the job, and recognition for work performed. <p><u>Management considerations:</u></p> <ul style="list-style-type: none"> • Volunteer requires direct relationship to ED, Board Chair or other management position related to the work being performed. • Mechanisms to keep the volunteer(s) in the organizational informational loop and resources to assure an appropriate work station, expense reimbursement, and recognition are critical. <p><u>Opportunities:</u></p> <ul style="list-style-type: none"> • High performer to further organization's work also can be a great advocate in the community. • If not on the board, should be considered for board position. <p><u>Challenges:</u></p> <ul style="list-style-type: none"> • Volunteer care and attention may require dedicated workstation, direct line to ED. • May perceive that he/she can 'fix' the agency. <p><u>Liability:</u></p>

		<ul style="list-style-type: none">• May need to offer mileage or other forms of expense reimbursement.	<ul style="list-style-type: none">• Should strongly consider Directors and Officers Insurance.
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