**The Volunteer Involvement Framework™**

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

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

The vertical “time” dimension of the matrix captures the person’s availability for service. The top row represents a short-term service commitment. Short-term may indicate a short stint of service (volunteering that occurs over a determined number of hours in one day or weekend), or it may suggest a specific, time-limited focus, where the volunteer signs on for a specific project that is limited in nature (although the project may occur on an annual or some other recurring basis). This volunteer is frequently called an “episodic” volunteer. The bottom row of the framework captures the person’s availability for service. The top row represents a short-term service commitment. Short-term may indicate a short stint of service (volunteering that occurs over a determined number of hours in one day or weekend), or it may suggest a specific, time-limited focus, where the volunteer signs on for a specific project that is limited in nature (although the project may occur on an annual or some other recurring basis). This volunteer is frequently called an “episodic” volunteer. The bottom row of the framework...
### Examples of Service:
- Corporate days of service with work teams
- Weekend house-build by a local service club
- Park clean-up event or trail maintenance
- Walkers, bikers, runners for annual fundraiser.

### Traits of Volunteers:
- Strong sense of connection to the cause, work group, club, or organization.
- Generally expects a well-organized event (materials and instructions immediately available to perform task, etc.).
- May be using the service opportunity to investigate a particular organization.
- May be part of a service group or meeting service requirements of a school, workplace, or club.
- May have unrealistic/naive expectations about the ability to impact clients or long-term work of the organization.
- May prefer to identify with their service club or company rather than the organization being served.

### Examples of Service:
- A one-time audit of an organization’s finances by a professional accountant
- A sports club teaching a youth group a particular skill and hosting youth for an event
- A student completing a degree requirement.
- A chef preparing a meal for a fundraiser

### Traits of Volunteer:
- Seeks a service opportunity tailored specifically to engage the volunteer’s unique skill, talent, or resources.
- May be any age, although slightly more likely to be adults with higher levels of skills/education.
- Likely expects mutuality, i.e., a peer-to-peer relationship within the organization (accountant to treasurer; event host to ED; etc.)
- May seek to negotiate timing of service.
- Appreciates recognition that is tailored to the unique demands of the position.
- May prefer to think of self not as a “volunteer” but an intern, pro bono consultant, etc., or other functional title.

### Examples of Service:
- Pro bono legal counsel
- No-cost medical service by a physician, EMT, nurse, counselor, etc.
- Volunteer firefighter
- Loaned executive
- Board member

### Traits of Volunteers:
- Similar to the quadrant to the left in commitment.
- Generally prefers to contribute through specialized skills and training.
- May elect to contribute talents through specialized service or may contribute time through policy and leadership roles such as board governance, visioning, etc.
- Often expects volunteer management that reflects the cultural norms of the given specialty or skill.
- Often combines talent with dedication to the cause, although the talent brought to the cause may supersede an allegiance to the mission.
- 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 appropriate to work performed.
represents the person who agrees to serve on a regular, ongoing basis, potentially making a long-term service commitment.

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

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

• Understanding volunteer motivations and trends (looking at the research on who volunteers are and what drives them)

• Creating a vision for volunteer engagement (thinking broadly about the four quadrants and how to plan for them)

• Maximizing your investment in volunteers (management/personnel strategies and a process for moving from vision to reality)

• Minimizing challenges and embracing opportunities (advice and resources that address leaders’ top concerns about volunteer engagement).

Throughout the Guide and in the notes directly following it, you will find resources to assist with further development of your community engagement initiative, including online tools and assessments. Additionally, Appendix A, which contains a worksheet for you to make notes on your own organization’s use of and/or plans for volunteers, allows for customization of The Volunteer Involvement Framework™ to meet your specific organization’s needs.
Position justification is a concern frequently raised by executive directors. As noted earlier, it is no more inappropriate to hire a volunteer manager than it is to hire a fund development director or marketing manager (see Myth 2, on page 4). Historically, most nonprofit organizations emerged from the work of a committed

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

**Weighing Opportunities, Challenges, and Risks**

<table>
<thead>
<tr>
<th>CONNECTION TO SERVICE</th>
<th>Affiliation Focus</th>
<th>Skill Focus</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TIME FOR SERVICE</strong></td>
<td>Opportunities:</td>
<td>Opportunities:</td>
</tr>
<tr>
<td>Short-term Episodic</td>
<td>• Can help promote organization, spread message, and build mailing list.</td>
<td>• Great way to secure important assistance not otherwise available.</td>
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<tr>
<td></td>
<td>• Ideal for accomplishing short-term, intensive work to grounds or building.</td>
<td>• Ideal training ground for more intensive service (e.g., committee, taskforce, or board work, as well as work in quadrant below).</td>
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<tr>
<td></td>
<td>• May use in database for advocacy, fund raising, or volunteer recruitment.</td>
<td>• Worthy addition to agency database.</td>
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<td></td>
<td><strong>Challenges:</strong></td>
<td>• May use service opportunity to evaluate person for possible employment.</td>
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<td></td>
<td>• Not always possible to provide client-oriented service.</td>
<td><strong>Challenges:</strong></td>
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<td></td>
<td>• Considerable advance planning required to assure that materials are available for large-scale service projects.</td>
<td>• Poorly handled service opportunity may harm reputation of organization.</td>
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<td>• Requires flexible schedule for staff leadership.</td>
<td>• Project preparation can be time-consuming, may require considerable upfront support.</td>
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<td></td>
<td><strong>Liability:</strong></td>
<td>• If an internship, may require supervisor with same training background.</td>
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<td></td>
<td>• Dependent on service project selected; best to notify insurance carrier of the date.</td>
<td>• May be a “cover” for a job search. If unemployed and finds a job, may leave volunteer assignment unfinished.</td>
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<td></td>
<td>• May require an event rider on agency policy.</td>
<td><strong>Liability:</strong></td>
</tr>
<tr>
<td>Long-term Ongoing</td>
<td>Opportunities:</td>
<td>Opportunities:</td>
</tr>
<tr>
<td></td>
<td>• Strong mission-based, consequential outcomes likely.</td>
<td>• High performer eager to further organization’s work.</td>
</tr>
<tr>
<td></td>
<td>• Worthy addition to agency database.</td>
<td>• Brings critical skill set to meet agency’s needs.</td>
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<td></td>
<td>• Mechanisms for volunteer input strongly recommended.</td>
<td>• Strong representative in the community, likely to be an able advocate.</td>
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<td></td>
<td>• Capable, informed advocates for organization.</td>
<td>• May prove to be an able recruiter, “buddy” or orientation leader for new volunteers.</td>
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<td><strong>Challenges:</strong></td>
<td>• May be an early retiree eager to be meaningfully involved.</td>
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<td></td>
<td>• Volunteers may become ‘over-invested’ in work of organization and make demands.</td>
<td>• If not on the board, may be considered for board position.</td>
</tr>
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<td></td>
<td>• Effective implementation time-consuming.</td>
<td><strong>Challenges:</strong></td>
</tr>
<tr>
<td></td>
<td>• Ongoing oversight important; dedicated volunteer management staff recommended.</td>
<td>• Volunteer may need care and attention including dedicated workstation and computer and direct line to COO/ED.</td>
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<td></td>
<td>• Staff buy-in essential.</td>
<td>• Other staff and volunteers must be knowledgeable about this person’s role and open to engaging this person in deliberations that will affect the given area of work.</td>
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<td></td>
<td>• Volunteers need to be given a voice in organization’s operations that affect them, informed of important changes, and updated on progress on key objectives.</td>
<td>• Generally speaking, there are more volunteers eager for these types of assignments then there are nonprofits ready to engage them.</td>
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<td><strong>Liability:</strong></td>
<td>• May perceive that he/she can ‘fix’ the agency.</td>
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<td></td>
<td>• Check requirements for appropriate background checks. Should be performed if volunteer works with vulnerable clients.</td>
<td><strong>Liability:</strong></td>
</tr>
<tr>
<td></td>
<td>• Should carry some form of liability policy.</td>
<td>• If behaviors prove problematic, may require formal honor and retirement to move individual out of service.</td>
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<tr>
<td></td>
<td>• May need to offer mileage or other forms of expense reimbursement.</td>
<td>• Should strongly consider Directors and Officers Insurance.</td>
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</tbody>
</table>
Appendix A
Worksheet: Assessing Current Patterns of Volunteer Engagement

Utilize the grid below, first to capture the ways in which you currently engage volunteers in your organization (remember to include your board of directors in this diagram). Next, fill in the grid with your ideas for how you might engage volunteers in your organization’s future work.

As you assess your current engagement practices take a few minutes to assess the effectiveness of your current situation as well. Where are volunteers most critical to your operations? How is this part of your system being managed and supported? How effectively does your staff work with your volunteers? What would you like to change, keep the same, or enhance?

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

Engage community
- Examine organizational mission
- Explore purpose & expectations associated with community engagement

Exploration of & preparation for community involvement
- Designate a point person
- Convene a planning team
- Identify policy & liability issues
- Prepare others
- Define positions, preparation & support
- Prepare space
- Allocate funds
- Determine record-keeping system

Recruit volunteers & connect to opportunities
- Target recruitment for position
- Interview check references
- Screen
- Orient
- Train
- Match to opportunities

Place, support & supervise volunteers
- On-the-job training
- Feedback & coaching
- Address problem behaviors
- Enlarge-enrich service opportunities
- Assess performance

Recognize volunteers
- Celebrate team performance
- Report achievements
- Acknowledge staff support

Assess program
- Evaluate outcomes
- Revise & improve program & service opportunities
- Review benchmarks
- Incorporate findings into ongoing operations

• Articulate agency philosophy & vision
• Explore the range of opportunities for community involvement

• Identify systems to gain staff support & involvement

• Involve volunteer leadership in organizational planning and deliberation

Agency Recognition Annual Reports

MISSION PLAN ORGANIZE IMPLEMENT & SUPPORT REVIEW

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