

Selected Pages From:

# **Strategic Volunteer Engagement**

*A Guide for Nonprofit and Public Sector Leaders*

Publication available online at:

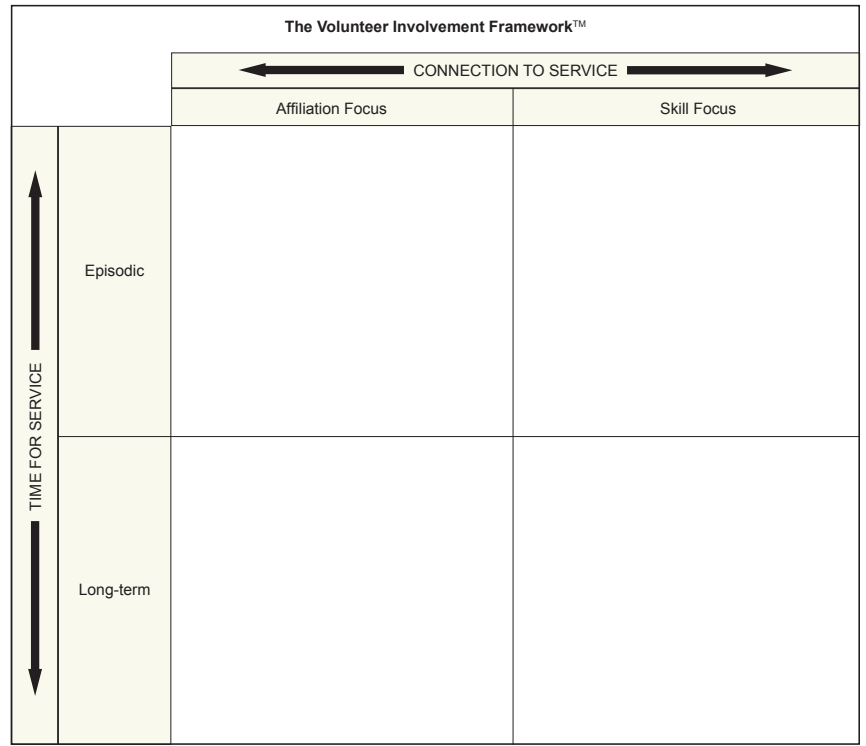
<https://www.volunteeralive.org/docs/Strategic%20Volunteer%20Engagement.pdf>






**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 than 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

		<b>The Volunteer Involvement Framework™</b> <i>Overview of Types of Volunteers</i>	
		 CONNECTION TO SERVICE	
		Affiliation Focus	Skill Focus
 TIME FOR SERVICE 	Short-term Episodic	<p><b>Examples of Service:</b></p> <ul style="list-style-type: none"> <li>• Corporate days of service with work teams</li> <li>• Weekend house-build by a local service club</li> <li>• Park clean-up event or trail maintenance</li> <li>• Walkers, bikers, runners for annual fundraiser.</li> </ul> <p><b>Traits of Volunteers:</b></p> <ul style="list-style-type: none"> <li>• Strong sense of connection to the cause, work group, club, or organization.</li> <li>• Generally expects a well-organized event (materials and instructions immediately available to perform task, etc.).</li> <li>• May be using the service opportunity to investigate a particular organization.</li> <li>• May be part of a service group or meeting service requirements of a school, workplace, or club.</li> <li>• May have unrealistic/ naive expectations about the ability to impact clients or long-term work of the organization.</li> <li>• May prefer to identify with their service club or company rather than the organization being served.</li> </ul>	<p><b>Examples of Service:</b></p> <ul style="list-style-type: none"> <li>• A one-time audit of an organization's finances by a professional accountant</li> <li>• A sports club teaching a youth group a particular skill and hosting youth for an event</li> <li>• A student completing a degree requirement.</li> <li>• A chef preparing a meal for a fundraiser</li> </ul> <p><b>Traits of Volunteer:</b></p> <ul style="list-style-type: none"> <li>• Seeks a service opportunity tailored specifically to engage the volunteer's unique skill, talent, or resources.</li> <li>• May be any age, although slightly more likely to be adults with higher levels of skills/education..</li> <li>• Likely expects mutuality, i.e., a peer-to-peer relationship within the organization (accountant to treasurer; event host to ED; etc.)</li> <li>• May seek to negotiate timing of service.</li> <li>• Appreciates recognition that is tailored to the unique demands of the position.</li> <li>• May prefer to think of self not as a "volunteer" but an intern, pro bono consultant, etc., or other functional title.</li> </ul>
	Long-term Ongoing	<p><b>Examples of Service:</b></p> <ul style="list-style-type: none"> <li>• Youth mentor</li> <li>• Troop leader</li> <li>• Sunday School teacher</li> <li>• Environmental sustainability advocate</li> <li>• Hospice visitor</li> <li>• Park host or docent</li> <li>• Thrift store manager</li> <li>• Auxiliary member or trustee</li> </ul> <p><b>Traits of Volunteers:</b></p> <ul style="list-style-type: none"> <li>• Committed to the group or organization and the cause or mission it represents.</li> <li>• Often willing to perform any type of work for the cause, from stuffing envelopes to highly sophisticated service delivery.</li> <li>• May need specialized training to prepare for the service opportunity (e.g., literacy tutoring, etc.)</li> <li>• May feel a special affinity to the organization because of past benefit, family connection, or other personal allegiance.</li> <li>• May be any age, although age may segment type of cause most likely championed.</li> <li>• May be ideologically motivated (religious, political, environmental, etc.) to champion a cause or issue.</li> <li>• Appreciates regular recognition, both formal and informal.</li> <li>• Often uses personal pronouns to talk about organization (me, we, us, our)</li> <li>• In addition to strong motivations for service, may well be a key donor</li> </ul>	<p><b>Examples of Service:</b></p> <ul style="list-style-type: none"> <li>• Pro bono legal counsel</li> <li>• No-cost medical service by a physician, EMT, nurse, counselor, etc.</li> <li>• Volunteer fire fighter</li> <li>• Loaned executive</li> <li>• Board member</li> </ul> <p><b>Traits of Volunteers:</b></p> <ul style="list-style-type: none"> <li>• Similar to the quadrant to the left in commitment.</li> <li>• Generally prefers to contribute through specialized skills and training.</li> <li>• May elect to contribute talents through specialized service or may contribute time through policy and leadership roles such as board governance, visioning, etc.</li> <li>• Often expects volunteer management that reflects the cultural norms of the given specialty or skill.</li> <li>• Often combines talent with dedication to the cause, although the talent brought to the cause may supersede an allegiance to the mission.</li> <li>• 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.</li> <li>• Expects staff support, assistance with resources necessary to the job, and recognition appropriate to work performed.</li> </ul>

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.

<p align="center"><b>The Volunteer Involvement Framework™</b>  <i>Consideration for Managing Volunteers</i></p>			
<p align="center">← CONNECTION TO SERVICE →</p>			
		Affiliation Focus	Skill Focus
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">TIME FOR SERVICE</p> <p>↑</p> <p>↓</p>	<p align="center">Short-term Episodic</p>	<p><b>Necessary Volunteer Manager Traits:</b></p> <ul style="list-style-type: none"> <li>• Good project leader with solid planning and project-management skills, attention to detail</li> <li>• Strong interpersonal skills: diplomatic, flexible, and accessible</li> <li>• Should be a good spokesperson for the cause: knowledgeable and passionate</li> <li>• Has time to interface with group liaisons</li> </ul> <p><b>Other considerations:</b></p> <ul style="list-style-type: none"> <li>• Collect contact information on volunteers to follow-up with other service and giving opportunities.</li> <li>• Consider rotating management task among existing staff members who meet qualifications (but be sure at least one person is maintaining oversight, centralized records).</li> <li>• Budget adequate funds for project-related resources including refreshments for work groups and possible recognition memorabilia.</li> </ul>	<p><b>Necessary Volunteer Manager Traits:</b></p> <ul style="list-style-type: none"> <li>• Strong human resources skills, respect for volunteer and job-sculpting expertise</li> <li>• Marketing skills to lead targeted recruitment effort; should be able to tell the organization's story, and to relate the specific task to your mission</li> <li>• Flexible, with willingness to adapt a project to the volunteer's expectations and time constraints</li> <li>• Open and available for follow-up and able to monitor progress collaboratively</li> </ul> <p><b>Other considerations:</b></p> <ul style="list-style-type: none"> <li>• These volunteers expect to be treated as respected equals, not as subordinates.</li> <li>• Nonprofit should be open to sharing relevant information as the volunteer gains knowledge of the agency, earns trust, and prepares for the task.</li> </ul>
	<p align="center">Long-term Ongoing</p>	<p><b>Necessary Volunteer Manager Traits:</b></p> <ul style="list-style-type: none"> <li>• Has significant time to devote to volunteers</li> <li>• Is knowledgeable about overall organization and its future direction</li> <li>• Has strong interpersonal and organizational skills and genuinely likes people</li> <li>• Continuity of leadership and institutional history helpful</li> </ul> <p><b>Other considerations:</b></p> <ul style="list-style-type: none"> <li>• These volunteers require a comprehensive volunteer infrastructure (e.g., dedicated staff person with not less than 20 hours per week dedicated to working with volunteers).</li> <li>• Budget to cover necessary program expenses (e.g., volunteer expense reimbursement, regular recognition, etc.)</li> </ul>	<p><b>Necessary Volunteer Manager Traits:</b></p> <ul style="list-style-type: none"> <li>• Usually the management person most closely aligned with volunteer's (or volunteer committee's) skill area must oversee work</li> </ul> <p><b>Other considerations:</b></p> <ul style="list-style-type: none"> <li>• As with quadrant to the left, dedicate considerable infrastructure to support these efforts (including necessary time and attention of ED and/or board members).</li> <li>• Time should be allocated for personal staff interactions with the skilled volunteer to support volunteers' efforts and to learn from their observations.</li> <li>• 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.</li> </ul>

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.idealists.org/en/vmrc/vmcareer.html>.

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

		<b>The Volunteer Involvement Framework™</b> <i>Weighing Opportunities, Challenges, and Risks</i>	
		<b>CONNECTION TO SERVICE</b>	
		Affiliation Focus	Skill Focus
<b>TIME FOR SERVICE</b>	<b>Short-term Episodic</b>	<p><b>Opportunities:</b></p> <ul style="list-style-type: none"> <li>• Can help promote organization, spread message, and build mailing list.</li> <li>• Ideal for accomplishing short-term, intensive work to grounds or building.</li> <li>• May use in database for advocacy, fund raising, or volunteer recruitment.</li> </ul> <p><b>Challenges:</b></p> <ul style="list-style-type: none"> <li>• Not always possible to provide client-oriented service.</li> <li>• Considerable advance planning required to assure that materials are available for large-scale service projects.</li> <li>• Requires flexible schedule for staff leadership.</li> </ul> <p><b>Liability:</b></p> <ul style="list-style-type: none"> <li>• Dependent on service project selected; best to notify insurance carrier of the date.</li> <li>• May require an event rider on agency policy.</li> </ul>	<p><b>Opportunities:</b></p> <ul style="list-style-type: none"> <li>• Great way to secure important assistance not otherwise available.</li> <li>• Ideal training ground for more intensive service (e.g., committee, taskforce, or board work, as well as work in quadrant below).</li> <li>• Worthy addition to agency database.</li> <li>• May use service opportunity to evaluate person for possible employment.</li> </ul> <p><b>Challenges:</b></p> <ul style="list-style-type: none"> <li>• Poorly handled service opportunity may harm reputation of organization.</li> <li>• Project preparation can be time-consuming, may require considerable upfront support.</li> <li>• If an internship, may require supervisor with same training background.</li> <li>• May be a "cover" for a job search. If unemployed and finds a job, may leave volunteer assignment unfinished.</li> </ul> <p><b>Liability:</b></p> <ul style="list-style-type: none"> <li>• Dependent on service project; investigate need for appropriate background check.</li> </ul>
	<b>Long-term Ongoing</b>	<p><b>Opportunities:</b></p> <ul style="list-style-type: none"> <li>• Strong mission-based, consequential outcomes likely.</li> <li>• Worthy addition to agency database.</li> <li>• Mechanisms for volunteer input strongly recommended.</li> <li>• Capable, informed advocates for organization.</li> </ul> <p><b>Challenges:</b></p> <ul style="list-style-type: none"> <li>• Volunteers may become 'over-invested' in work of organization and make demands.</li> <li>• Effective implementation time-consuming.</li> <li>• Ongoing oversight important; dedicated volunteer management staff recommended.</li> <li>• Staff buy-in essential.</li> <li>• 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.</li> </ul> <p><b>Liability:</b></p> <ul style="list-style-type: none"> <li>• Check requirements for appropriate background checks. Should be performed if volunteer works with vulnerable clients.</li> <li>• Should carry some form of liability policy.</li> <li>• May need to offer mileage or other forms of expense reimbursement.</li> </ul>	<p><b>Opportunities:</b></p> <ul style="list-style-type: none"> <li>• High performer eager to further organization's work.</li> <li>• Brings critical skill set to meet agency's needs.</li> <li>• Strong representative in the community, likely to be an able advocate.</li> <li>• May prove to be an able recruiter, "buddy" or orientation leader for new volunteers.</li> <li>• May be an early retiree eager to be meaningfully involved.</li> <li>• If not on the board, may be considered for board position.</li> </ul> <p><b>Challenges:</b></p> <ul style="list-style-type: none"> <li>• Volunteer may need care and attention including dedicated workstation and computer and direct line to COO/ED.</li> <li>• 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.</li> <li>• Generally speaking, there are more volunteers eager for these types of assignments than there are nonprofits ready to engage them.</li> <li>• May perceive that he/she can 'fix' the agency.</li> </ul> <p><b>Liability:</b></p> <ul style="list-style-type: none"> <li>• If behaviors prove problematic, may require formal honor and retirement to move individual out of service.</li> <li>• Should strongly consider Directors and Officers Insurance.</li> </ul>

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<sup>1</sup> in this

diagram). Next, fill in the grid with your ideas for how you might engage volunteers in your organization’s future work.

		The Volunteer Involvement Framework™	
		← CONNECTION TO SERVICE →	
		Affiliation Focus	Skill Focus
TIME FOR SERVICE	↑	Episodic	
	↓	Long-term	

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?

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**

