



10
THINGS

**EVERY
BOARD MEMBER
NEEDS
TO KNOW**

Volunteers

The Heart and Soul
of Your Nonprofit

by Pam Betz

Mission

Our mission is to foster effective risk management practices and the overall development and advancement of nonprofits through unique, creative initiatives.

Ten Things series for nonprofit boards

Welcome to this series of short briefing papers for board members of nonprofit organizations. This series was developed to help both seasoned and beginning board members improve their skills at steering, supporting, and safeguarding nonprofit organizations. Through this series, First Nonprofit Foundation seeks to stimulate board discussions on topics essential to quality governance. Other booklets in this series include the following:

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Advancing Together: The Role of the Nonprofit Board in Successful Strategic Alliances

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Evaluating the Executive Director: Your Role as a Board Member

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“Volunteers are the only human beings on the face of the earth who reflect this nation’s compassion, unselfish caring, patience, and just plain loving one another.”

—Erma Bombeck

Volunteerism is the heart and soul of the nonprofit sector. Indeed, many nonprofit board members are themselves volunteers. The organization that manages its volunteer resources wisely has real advantages. It can continue to attract generous people to its cause. It can expand its reach and use its paid staff more efficiently. It can weave itself more deeply into the communities it serves. It can more readily identify new donors, open doors, gain crucial legislative support, and affect the lives of its constituents.

The following ten tips will help your board as it seeks to make the organization a great place to volunteer:

1. Craft a volunteer philosophy statement
2. Include a volunteer goal in the organization’s management plans
3. Measure the impact of the volunteer program
4. Fund effective volunteer management
5. Staff the volunteer program
6. Embrace volunteers in your risk management
7. Create a culture of positive volunteer-staff relations
8. Make volunteer recognition an ongoing and consistent practice
9. Engage volunteers to help market, advocate, and fundraise
10. Remember that volunteers are potential donors and door-openers



1.

Craft a volunteer philosophy statement

The nonprofit board defines the organization's mission and guides the direction of the organization. Many, if not most, nonprofits rely on volunteers to bring programs and services to life and to serve on the board.

For most nonprofits, a volunteer philosophy statement is a basic building block in a volunteer program. It should be developed by the board. The statement articulates the nonprofit's commitment to volunteers. Here is a sample statement:

Our agency encourages the teamwork of employees and volunteers so that we can offer our consumers the best services possible. Volunteers contribute their unique talents, skills, and knowledge of our community to provide personalized attention to clients, enable the paid staff to concentrate on the work for which they were trained, and educate the public about our organization and its cause.¹

In crafting the statement, board members should keep in mind that the standards that apply to volunteers also apply to board members.

A good philosophy statement is grounded in the organization's mission. The philosophy should "aim big," as an expression of the organization's hopes, vision, and treatment of people. For example, if your intention is to involve volunteers as an expression of your goal of broad participation of constituents and community members, state this. Explain the board's view that volunteers are a significant organizational asset and express your commitment to attracting and engaging skilled volunteers.

A volunteer philosophy is also the ethical compass that charts the engagement of volunteers and the organization's accountability to the community at large. This philosophy statement should not be taken lightly, as it is an intrinsic commitment to your volunteers. That commitment may include financing volunteer activities, managing and training volunteers, protecting them, and recognizing them appropriately for their contribution of time and talent.

The statement does not need to be complex. The board's role is to set broad policy while the staff implements it. The staff may be responsible for developing more specific guidelines to include in a volunteer manual, while the board sets a philosophy to guide the goals, development, and appropriate review of such a manual.

Volunteers engage in nonprofit organizations in multiple capacities, including board leadership, service delivery, fund development, and much more. Volunteers should have the same commitment to the organization's mission and values statement as

the staff. Regardless of how volunteers choose to serve your organization, they should be respected and protected. Volunteers help connect the organization to the community and connect the community to the organization. They are the eyes, ears, and mouth of the organization. Volunteers lend credibility, build trust, and attract resources and contributions.

Philosophy statements are general, but they are usually followed by policies that express why volunteers are engaged by an organization; what roles they play; what work they may (and may not) do; what standards govern them; how they are recruited, managed, evaluated, and recognized; the conditions under which they may be terminated; the training, if any, they may receive; their rights; and their responsibilities.² (In organizations where volunteers may be in contact with vulnerable children or adults, additional policies should be written to protect the vulnerable individuals as well as the volunteers, staff, and organization as a whole. Legal assistance may be desirable to review such policies.)

Depending on the size of your organization, the board's philosophy statement regarding volunteers may require the involvement of key staff. For example, organizations that already use many volunteers will likely have some policies and practices in place at the operational level and may have a staff person charged with recruiting and overseeing volunteers. In these organizations, staff members may draft the initial policy. In smaller organizations or those lacking a tradition of using volunteers, the board may need to do the bulk of the research and development.



2.

Include a volunteer goal in the organization's management plans

Having a philosophy statement regarding volunteers for your organization is the first step in the effective use of volunteers. The path from philosophy to implementation is best traveled through your organization's planning methods. Typically, these are the organization's strategic and operational plans, which are expressed in its annual budget.

Strategic plans set the organization's long-term broad goals for accomplishing its mission, while operational plans express those strategies in measureable goals and objectives. The annual budget explains how financial resources will be allocated toward those goals and objectives. There are as many approaches to this process as there are nonprofits, but one thing is certain: if you use volunteers, your strategic, business, budget, and other major planning processes should include goals for those volunteers.

Board oversight of planning does not mean the board is involved in day-to-day organization operations. That is clearly the responsibility of staff, but with the strategic plan as the organization's road map, the board can regularly assess progress toward meeting the strategic plan's goals based on staff input.

With a broad strategic goal in place, objectives can be developed. These could be focused around the Four Rs of effective volunteer management and utilization. The Four Rs are research and readiness, recruitment, retention, and recognition.

Research and readiness: Assess the organization's readiness to receive volunteers.

During the research portion of the Four Rs, the goal is to identify and prioritize volunteer needs by contacting all key constituents (board members, staff members, clients, donors, community leaders, professionals, and other stakeholders). The groups can provide insider and outsider perspectives. This knowledge can be used to develop volunteer service area opportunities and descriptions. To foster positive volunteer and staff relations, be sure to involve staff members in the research phase. Staff members know the roles volunteers can play, and staff involvement ensures buy-in.

Based on whether a volunteer program is new to your organization or firmly established, your annual plan could include the following objectives:

- Develop and implement an organizational needs assessment to determine volunteer service opportunities.
- Project the number of volunteer service positions to be recruited, trained, and placed; develop requisite service descriptions.
- Conduct an internal profile of current volunteers and their available skills, including a percentage of volunteers who are donors and, conversely, donors who volunteer. This will provide valuable information, as fundraising and volunteer involvement together is referred to as community resource development.

Recruitment: Determine whom to recruit, when, how, and for what purposes.

The research phase deepens your understanding of the roles volunteers play in your organization and how you might best use this resource. Recruitment follows research, and it should be strategic. Set goals to seek individuals who meet specific needs. Objectives could address the following:

- **Who:** Identify the skill sets needed; create profiles of volunteers being sought.
- **What:** Define what volunteer positions need to be filled.
- **When:** Define time parameters for each volunteer position. For example, identify how often volunteers are needed, whether their use is project- or event-specific, the number of hours or months the volunteer is needed, and a recruitment completion date.

- **How:** Create a volunteer recruitment campaign complementing the objectives outlined above.

Typically, objectives are stated in broad measures, such as recruit XX volunteers and increase volunteer corps by X percent. In sophisticated volunteer programs, measurable goals might include rates for the number of inquiries that are converted to volunteers, how long conversion takes, and many other measures. The board does not need to be involved in the nitty-gritty details, but it should look for evidence of feasible, measurable objectives.

Retention: Keep qualified and satisfied volunteers involved with your organization.

Retention objectives should also flow from the research and should express the organization's goals for volunteer involvement. Orientation, training, satisfaction surveys, and recognition programs contribute to retention. Typical goals include the following:

- Develop and provide comprehensive volunteer training and orientation programs; assess or update as needed.
- Institute an annual retraining or update for all volunteers, including board members.
- Conduct an annual volunteer satisfaction survey, including an evaluation of the volunteer management program.

Recognition: Create an environment that recognizes volunteers both formally and informally.

Volunteers generously give their time and talent (and often financial resources) and deserve to be thanked and recognized for their contributions. The final set of objectives should be set around both formal and informal means of recognition. These vary widely, of course, depending on the organization, its resources, its traditions, and the preferences of volunteers.

Here are two typical goals you might include:

- Provide X number of regularly scheduled volunteer recognition activities.
- Be sure that every volunteer receives a formal thank-you letter from the organization.

When time and thought are dedicated to developing a clear path for managing an effective volunteer program, the rewards are numerous. Staff, volunteers, and clients are all winners, and the organization earns a positive reputation in the nonprofit community—a priceless benefit.

3.

Measure the impact of the volunteer program

A recurring item on a typical board agenda is the fund development report. One of the key functions of board members is to generate income for the organization and track progress toward achieving the annual goal. Volunteers are a resource, too, and so it makes sense to routinely track progress toward volunteer goals.

Consider having a community resource development report at each board meeting. This report quantifies involvement of volunteers by the number of hours served or “value added” in equivalent dollars, as well as tracking dollars raised. This way, the board gets a broader picture of the resources flowing into the organization—both financial resources and “people power.” These reports might include the following items:

- Number of volunteer placements
- Number of hours contributed
- Average number of hours per volunteer
- Full-time equivalent (FTE) hours (number of hours served divided by 2,080 FTE hours per year)
- Number of volunteers by department or function
- Value-added equivalent, determined by multiplying the average hourly dollar value for volunteers (available at www.independentsector.org) by the number of hours served
- Volunteer prospect conversion rate (the number of volunteer inquiries and percentage converted to active volunteers)
- Volunteer retention rate (the number of volunteers lost when compared to the number of volunteers recruited to determine the volunteer retention rate)
- Number of volunteers who are donors

A volunteer impact measurement is often used to substantiate budget expenditures and staffing for a volunteer program, enhance grant requests, and provide valuable feedback to staff members, clients, and the community at large.

The quantification of volunteer value gains the attention and respect of board and staff members alike. Regular reports of volunteer impact help the organization develop realistic volunteer goals for future plans and set annual benchmarks. Volunteer impact can also be assessed through a volunteer satisfaction survey that can be administered to clients, volunteers, and staff members. Free online tools such as Survey Monkey allow you to format surveys that people can answer anonymously. Surveys can address quality of training, orientation, volunteer-staff relations,

volunteer recognition, and so forth. Surveys are also a great way to ask people to contribute ideas and suggest volunteer prospects.

Questions could address attitude, helpfulness, reliability, timeliness, courtesy, confidentiality, the quality of volunteer management, and other areas you wish to measure.

Overall, volunteer retention is the ultimate success factor in any volunteer management program and a major indicator of volunteer impact, just as dollars raised reflect the success of the fund development program. Board awareness through these reports can allow for adjustments as needed.

4.

Fund effective volunteer management

The board demonstrates its commitment to using volunteers by appropriately funding a volunteer management program. Volunteers may provide free services to an organization, but they certainly are not “free.” It costs money to properly recruit, retain, and recognize volunteers, not to mention the time it takes for staff to help with volunteer training and utilization. However, these costs can be balanced against the value volunteers bring to the organization as expressed in their work with clients, their roles as community ambassadors, their loyal contributions to the organization, and their contributions to the mission. (The community resource development report, described in Tip 3, provides additional measures of volunteer value.)

Volunteer service administration requires staffing. Depending on the number of volunteers used, the amount they are used, and the complexity of their responsibilities, administration may dedicate one or more staff members to this function, either in a part-time position, as a full-time volunteer, or minimally, as a line item in a staff job description.

To maximize the effectiveness of volunteer services, the organization must devote time to properly manage the function. It is not unusual for smaller or fully volunteer-run nonprofits to devote a majority of their efforts to recruiting volunteers without taking into consideration their readiness for receiving, retaining, or recognizing them.

A successful program is best implemented if based on the Four Rs of volunteer management: research and readiness, recruitment, retention, and recognition, which are described in Tip 2. Be certain to budget for tangible expenditures as well as direct and indirect staff time.

Research: Fund volunteers required for the coming year.

Funding may be needed to identify organizational needs, including a review of volunteer roles and service descriptions and a legal review of policies and procedures. Be sure the annual budget addresses research needs over the coming year.

Recruit: Provide funds to market the volunteer program and convert prospects into volunteers.

A well-developed recruitment plan involves current volunteers, staff, and board members, as new volunteer prospects can be identified through their respective spheres of influence. Funding may be needed to identify constituencies, conduct awareness and cultivation activities, and conduct recruitment campaigns (for example, during National Volunteer Week in April or a significant organization event).

It has been said food is the common denominator for volunteers. Therefore, food should certainly be part of the budget. Here are some suggested budget line items relative to recruitment:

- Food and beverages
- Print materials (fliers and volunteer and organization information packets)
- Decorations
- Promotional items (pens, pads, and so on)
- Audiovisual equipment for events (a podium, mike, or other equipment)
- Online and social network activities and promotions

These costs are applicable to recognition activities as well. Depending on the organization's service area, other expense items for processing volunteers can include fingerprinting, criminal background checks, chest x-rays, drug screenings, inoculations, uniforms, ID badges, mileage reimbursement, license fees, and so forth. Some organizations absorb these costs, and some require volunteers to cover them. In the latter case, the nonprofit may offer a sliding fee to defray costs.

Retention: Budget to keep volunteers satisfied, trained, and appreciated.

Retention is enhanced when new volunteers receive comprehensive orientation to the organization, including guidelines, responsibilities, and training specific to their placement. The budget must cover these activities.

Training and managing volunteers differs from managing staff. There are similar expectations for consistency, timeliness, safety concerns, and performance expectations, but volunteers may not bring the range of skills needed to their volunteer work. If they volunteer infrequently, their learning curve may be longer. On the other hand, volunteers must be committed and focused on gaining the necessary training to assist them in truly making an impact. The budget, therefore, needs to account for the level of training required. Staff time invested to help volunteers must be accounted for as well.

Effective volunteer training and orientation programs use a variety of approaches and media. This may include hands-on, classroom, and online training, and so forth. The board's oversight may extend to ensuring the approaches fit the type of volunteers being used and that funds are provided to supply the requisite equipment, materials, and training. Budgeted line items might include printing costs for orientation materials and training packets and costs related to producing videos and website development. Indirect costs might include staff time to conduct effective training sessions.

Recognition: Fund incentives that reward volunteers for their generosity.

Of the Four Rs, recognition is often the most costly, although it need not be. The challenge for both board and staff is to come up with creative recognition activities and mementos that are engaging, meaningful, and affordable. As noted earlier, food, beverages, entertainment, and appreciation gifts are typical budget items.

5.

Staff the volunteer program

Regardless of the size of your nonprofit organization, if you use volunteers, a designated staff member or volunteer should be responsible for managing your volunteer program. Funding is necessary to plan and structure the volunteer program as well as to implement it. Failure to staff the volunteer program can diminish volunteer impact, satisfaction, and retention.

Volunteer directors need skills in human resource management, special event planning, financial management and budgeting, conflict resolution, communications, and more. For small or financially challenged organizations, funding a volunteer director and program may seem untenable. A volunteer director may *also* be a volunteer, however, as the case below illustrates.

An animal rescue organization was formed in Phoenix, Arizona, to care for the large number of abandoned cats and dogs resulting from local home foreclosures. The need to recruit, respond to, and engage volunteers to aid in this effort became overwhelming. With no volunteer program or procedures in place, the executive director felt immobilized.

She enrolled in a volunteer management course and learned that to effectively use the outpouring of volunteer support she would have to take the time to develop a structured organizational volunteer program based on the Four Rs. She began by recruiting a volunteer to train as the volunteer coordinator. This individual was taught how to

handle various aspects of the program. Service descriptions, policies and procedures, liability coverage, risk management, and recognition practices were put into place.

Today the executive has an organization that attracts highly qualified volunteers who remain passionate about the organization. Her investment in planning yielded outstanding results.

Retaining happy, satisfied volunteers is extremely important regardless of your organization's size or capacity. Volunteers want to know their time is being used meaningfully. Today's volunteers range from high school students engaged in service learning to workplace volunteers to today's retiring baby boomers. They all state a desire to engage in meaningful volunteer service that maximizes their time, talent, and impact on the organization and its clients.

Volunteers are a significant investment of the organization's time, talent, and treasure. Wise organizations make the most of that investment. It is not unusual to see motivated volunteers who serve with little or no structure become disillusioned due to lack of training, respect, recognition, structure, staff interest, or opportunity to use their time wisely. Arriving at that delicate balance between structure and meaningful service, positive volunteer-staff relations become critical.

6.

Embrace volunteers in your risk management

Effective risk management requires the support and participation of individuals throughout the organization, including the volunteers who bring the nonprofit's mission to life. Consequently, successful nonprofits consider the work of volunteers when they craft risk management policies. (Nonprofits that have a risk management committee may include volunteers as essential members.) In addition to engaging volunteers in the design of risk management strategies and policies, an effective risk management program will encourage volunteers to report safety concerns and suggest improvements to the safety of its programs, services, facilities, and operations.

Volunteer service can expose a nonprofit to liability, and volunteers can also suffer harm while participating in the organization. Volunteer on-boarding and training processes should be developed with attention to harm or loss that could result from the participation of volunteers. Here are some general tips for any volunteer program concerned about risk:

- Volunteer policies should be unambiguous and widely distributed. A volunteer who doesn't understand a safety policy or isn't aware the policy exists can't contribute to safety in your nonprofit.
- Volunteers should be encouraged to ask questions and speak up if they witness or observe any situation or circumstance they believe is hazardous to clients, other volunteers, or the general public.
- Volunteers who report hazards or policy violations should be thanked for their commitment to the risk management goals of the nonprofit.

Insurance is an important risk financing tool for nonprofit organizations and is often a key component of a risk management program. Although having insurance in place does not affect the likelihood of a loss or claim, a comprehensive insurance program often provides peace of mind for the dedicated leaders of nonprofits. Many nonprofit board members recognize the importance of directors' and officers' (D&O) liability and employment practices liability (EPLI) coverages as components of a nonprofit's insurance (risk financing) program. These policies protect the nonprofit as well as its board members and staff by providing defense and indemnity for a wide range of alleged "wrongful management acts," including allegations of mismanagement, wrongful termination, and illegal discrimination.

General liability (GL) coverage offers protection against claims alleging bodily injury and property damage. It is an essential coverage for any nonprofit whose volunteers could cause or suffer an injury while participating in the organization.

Many nonprofits with large volunteer workforces also purchase volunteer accident coverage, which provides protection in the event a volunteer experiences an accident while serving the organization. This is generally an affordable alternative to covering volunteers under the nonprofit's workers' compensation policy.

A significant accident at a nonprofit can undo years of hard work establishing a stellar reputation. The fallout from poorly handled accidents and incidents can include the loss of valued staff, volunteers, and loyal donors. Negative publicity can severely shake volunteers' confidence, if only through guilt by association and the damage to their pride. It takes time and effort to rebuild trust and recruit volunteers and supporters back to the cause.

The best defense to the risk of loss, harm, or negative publicity is indeed a good offense. Nonprofits that rely on the service of volunteers should factor that service into the design and implementation of risk management strategies and ensure that potential losses stemming from volunteer service and volunteer injuries are covered under the organization's insurance program.

(See the *Ten Things* publication *Risk Management: Your Role as a Board Member* for more information on risk management.)

7.

Create a culture of positive volunteer-staff relations

Volunteer-staff relations are at the core of mutual respect and should ideally reflect the organization's values and culture regardless of its size. Just as a nonprofit has a clear mission statement, it should also have a set of values the organization will use to conduct its business and treat people. Many organizations create value statements. The next time your organization visits its values statement, explore how those values are manifested when working with volunteers and how they are communicated to staff. Values can be infused through the organization by combining both "bottom-up" and "top-down" messages.

Both the board and staff leadership must consistently operate within the framework of stated values. Operation within values becomes an expectation upon which work performance is evaluated and rewarded. The values permeate staff members, volunteers, and the board and are expressed in policy guidelines as well as unspoken norms and behaviors.

For example, when an organization's CEO takes time to personally welcome new employees or volunteers at their orientation, the CEO is expressing a value of kindness, respect, inclusivity, and hospitality. Here are other concrete manifestations of a culture of respect for volunteers:

- The organization's new employee orientation includes a segment on working with volunteers.
- Staff members are evaluated in part on how they interact with volunteers.
- Line workers are given opportunities to manage volunteers as a way of gaining valuable management experience.

Staff awareness of the benefits that volunteers add to the organization also fosters productive volunteer-staff relations. Staff should receive some of the same reports the board receives (see the community resource development report described in Tip 3). Such reports help staff see how much value volunteers add to the organization. Success stories involving volunteers, volunteer impact on client satisfaction, and positive media reports all give a "face" to the role of volunteers in improving people's lives.

With good staff supervision, volunteers are likely to use current skills or acquire new ones. When unemployment is high, volunteerism tends to increase for a variety of reasons, including increased time availability, desire for networking opportunities, maintenance or acquisition of new skills, or career exploration opportunities.

A culture of respect for volunteers means staff members are open to receiving the opportunities volunteers bring. As “outsiders,” volunteers have a fresh perspective that can lead to service improvements. They can open new doors for funding, in-kind donations, and potential partnerships not previously available. They can connect the nonprofit to prospective new volunteers or untapped community leaders, which can lead to enhanced organizational awareness in the community.

Nevertheless, staff members can have justifiable concerns for working with volunteers. Inconsistent or infrequent volunteer service can impact the quality of service delivery. New or intermittent volunteers require training and retraining, which burdens your staff. Volunteers can resist taking direction from staff members. They may not comprehend the need for timeliness, accuracy, enthusiastic teamwork, and so forth. When staffing is tight, each minute is precious to those employees.

Management’s job is to ensure the values and actions consistently reinforce positive relations between staff and volunteers, attending to the constraints each face and the benefits both gain. This is a balancing act. In the final analysis, volunteer-staff relationships are a two-way street. Each must learn to adapt and understand each other’s needs and expectations.

The board’s job is to foster a culture that promotes positive volunteer-staff relations by giving management and staff the resources they need, by modeling the behaviors they expect, and by setting policy and values that are key to volunteer success.



8.

Make volunteer recognition an ongoing and consistent practice

It is basic human nature to want to be appreciated and recognized for putting forth your best effort. In no place is this more evident than when volunteers give their time and talent freely to help those in need.

Recognizing volunteers for their service can be done informally, ranging from a simple thank-you to calling the volunteer by name. More formally, the organization can present a meaningful award in the presence of the volunteer’s family and peers. In such situations, it is not unusual for a volunteer to say, “But I get back so much more than I give” or “I’m just a volunteer.”

Volunteer recognition is a form of resource stewardship, and it is basic to any effective volunteer program. Volunteer appreciation should not be episodic; it should be an ongoing process that is embedded in the culture. Positive staff relations are key to volunteer satisfaction. Working side-by-side, staff members offer guidance, encouragement, and praise for the volunteer's efforts, as do the program recipients.

Assessing and understanding the volunteer's motivation for volunteering is critical in ascertaining what sort of recognition is most meaningful to him or her.

Social events around food are the most common expression of appreciation for volunteers and are usually offered during National Volunteer Week in April, near holidays, or at significant milestones in an organization's history. Such events may be costly, but with ingenuity many related expenditures can be underwritten with in-kind donations.

Recognition offers many opportunities to be creative. Challenge your staff and board leadership to identify unique opportunities to recognize volunteers in ways relevant to the mission. Notes or pictures from grateful clients, pictures in clever frames, letters to employers and family members, birthday cards with handwritten notes, recognition at board meetings, and so forth are all meaningful ways to say "thank you" without taxing the budget.



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Your staff must not overlook acknowledging board members for their leadership and service as well. Both board and key staff members should participate at recognition events.

An excellent way to enhance volunteer-staff relations and promote inclusivity is for the board or designated volunteer manager to include employees who volunteer in the community (regardless of which organization they volunteer for), especially during National Volunteer Week, affirming their donation of time and talent. Social media is a popular and expedient way to recognize volunteers by posting pictures on your Facebook or web pages. (With social media, always exercise judgment because good intentions can be overshadowed by indiscretion.)

Regardless of how you acknowledge and appreciate volunteers, the expression must be consistent, transparent, and genuine at all times.

9.

Engage volunteers to help market, advocate, and fundraise

Volunteers and staff members are an organization's best advocates, ultimately serving as rich public relations, marketing, and fundraising resources. Harness their enthusiasm and passion so maximum outcomes can be realized.

An extremely effective way to mobilize community volunteers and awareness is through the community leadership council model. The council, composed of representatives from your organization's current and desired target markets, can be recruited for the simple purpose of opening doors to their networks and gathering more information about the issue your organization is addressing. With little effort, this model brings in donations and new volunteers even as it helps you gather important information.

The community leadership council should state clearly defined roles, responsibilities, and time commitments for its members. These may include the following:

- Attendance is expected at regularly scheduled meetings and events; bimonthly meetings are recommended.
- Tour the organization to see its programs firsthand.
- Open doors to key constituencies who could help with your issue.
- Serve as a well-informed advocate to one's community network.
- Recommend prospective members to serve on the leadership council.

For example, United Blood Services (UBS) in Phoenix instituted bimonthly educational breakfast meetings that last 75 to 90 minutes. Each meeting includes an educational presentation where members learn valuable information about the organization and its programs, the critical need for blood donations, and how UBS ranks nationally to address that need. In addition, UBS Heroes—individuals who go the extra mile on behalf of UBS's mission—are recognized at every meeting. This recognition motivates key community leaders to participate and seek to become a "hero."

A community leadership council is just one of many ways to organize and equip your volunteers to be knowledgeable advocates for your organization. The greater lesson is that with minimal organization, volunteers can be a persuasive force for your organization.

10.

Remember that volunteers are potential donors and door-openers

Volunteers, both board members and others, are a rich fundraising resource. They can be donors, door-openers, or both.

Include volunteers in donor prospect identification and evaluation sessions and exercises designed to uncover their spheres of influence. These activities are a quick and effective way to involve volunteers in identifying prospective donors who have the capacity and inclination to give, if asked by colleagues or friends. Such sessions get volunteers thinking about potential donors from several different perspectives—personal, professional, friend and family connections, and so forth.

Volunteers may not be interested in direct fundraising for their organization but often are willing to open doors to their contacts so that staff or appropriate board members can begin the cultivation process. Working closely with volunteers in this capacity deepens the relationship with them and increases their support for the organization.

Over the years there has been an ongoing debate about whether to ask hands-on volunteers for their philanthropic support when they are already donating their time. Some volunteers will resent the “ask,” while others will be offended and feel excluded if not solicited, particularly if a special campaign is underway. Usually, volunteers should be screened and cultivated for their support, just as donors are. Assessing their propensity or capacity for giving diminishes the risk of hurt feelings.

Fundraising volunteers require a special skill set, including passion for the organization’s mission and persuasive communication and leadership skills. Just as hands-on volunteers are motivated by directly serving others, fundraising volunteers are often compelled to get involved through service on the organization’s development, capital, or special campaign committees. Participating on a special event planning committee is often an entry point for volunteer involvement in either fundraising or service delivery.

Regardless of the roles a volunteer chooses to play in your organization, all volunteers should be well-versed in the organization’s mission, programs, and most immediate needs. Fundraising volunteers, in particular, should be able to clearly articulate the organization’s case for support. This is especially important if they are asked to participate in solicitations.

The volunteer director (whether a paid staff member or a volunteer) should be sensitive to development needs as well, because they can play a critical role in linking the volunteer with those responsible for fund development. The organization that understands that volunteer management and fund development are intimately linked is ahead of the curve in building and sustaining its organizational capacity.

The many benefits of volunteers

In conclusion, regardless of the size of your organization, the initial investment of time and resources to organize and implement an effective volunteer program will yield a significant return on your investment. The commitment of board members is vital to the success of volunteer involvement, for as volunteers themselves, they commit to embracing and modeling the valuable roles volunteers can play in delivering meaningful service in support of the organization's mission. This support must come from the top down and bottom up to maximize the full potential of this rich resource and ensure the program's sustainability.

Taking the time to step back, plan, and institute a successful volunteer program is often the single greatest barrier and challenge to success. With the tools offered in this booklet, we hope you will just do it. The offer to contribute one's time, talent, and passion to your organization's mission is a gift you must be ready to receive and fully appreciate.

Endnotes

¹ Excerpted from Leading the Successful Volunteer Involvement by Betty B. Stallings with Susan J. Ellis. Copyright 2010, Energize, Inc. Found in the Energize website library at <http://www.energizeinc.com/art.htm>.

² A helpful policy example is “A Model Policy on Volunteering,” which may be downloaded at http://www.wcva.org.uk/all/dsp_Pub_infosheet_detail.cfm?Publicationid=38&display_sitedeptid=6.

Helpful resources

Leading the Way to Successful Volunteer Involvement: Practical Tools for Busy Executives, by Betty B. Stallings with Susan J. Ellis. Philadelphia: Energize, Inc., 2010. www.energizeinc.com/art/altw.html.

From the Top Down: The Executive Role in Successful Volunteer Involvement, 3rd Edition, by Susan J. Ellis. Philadelphia: Energize, Inc., 2010. www.energizeinc.com/store/1-102-E-3.

Independent Sector's Value of Volunteer Time:

Independent Sector, www.independentsector.org/volunteer_time.

Helpful websites

Independent Sector: www.independentsector.org

Energize Inc.: www.energizeinc.com

Volunteer Match: www.volunteermatch.org

HandsOn Network: www.handsonnetwork.org

Philanthropy News Digest: www.foundationcenter.org

Corporation for National & Community Service: www.nationalservice.gov

United Way: www.unitedway.org/take-action/volunteer

Habitat for Humanity: www.habitat.org

Hon Kachina Volunteer Awards: www.honkachina.org

Blue Avocado: www.blueavocado.org (newsletter)

Foundation Center: pubhbalerts@foundationcenter.org (sign up to receive anything published daily about philanthropy, volunteerism, boards, and other subjects)

Alliance for Nonprofit Management: www.allianceonline.org

ASU Lodestar Center for Philanthropy & Nonprofit Innovation: nonprofit.asu.edu

Association of Fundraising Professionals: www.afp.org

AARP: www.createthegood.org

United Healthcare: www.dogoodlivewell.org/Volunteer

Nonprofit Risk Management Center: www.nonprofitrisk.org

American Association of Museum Volunteers: www.aamv.org

Association of Hospital Volunteer Resource Professionals: www.ahvrp.org

About the author

PAM BETZ has been president of Betz & Company since 1996. Betz & Company is a consulting firm that partners with the community to design and employ comprehensive community resource development planning and implementation for both the nonprofit and for-profit sectors. Her consulting expertise is in effective volunteer management and leadership development, as well as fund development with emphasis on annual giving and special event fundraising.

Betz also serves as executive director of the Hon Kachina Council, a nonprofit organization that inspires volunteerism by recognizing ordinary individuals doing extraordinary things, applauding them, and presenting them as an example to motivate others to volunteer.

Betz served as corporate director of community resources for St. Luke's Health System from 1986 to 1995. There, she was responsible for the management of five affiliated nonprofit organizations and an extensive volunteer program for four medical centers. Betz served as an adjunct professor at Arizona State University's Lodestar Nonprofit Management Institute from 1992 to 2011, teaching a course called Managing Volunteer Effectiveness. In addition, she serves as a Technical Assistance Partnership consultant through St. Luke's Health Initiatives, focusing on special event fundraising and effective volunteer management. She is a graduate of Wilson College, with additional studies at the University of Maryland and Arizona State University (ASU). She is a graduate of Scottsdale Leadership and has her certification in nonprofit organizational management from the ASU Lodestar Center. Betz was recognized with the inaugural Association of Fundraising Professionals Chapter's President's Award in 2004 and the Frances Young Volunteer Hero Award in 2008 by the City of Scottsdale, Arizona.

Series editor

VINCENT HYMAN, series editor, is an award-winning writer, editor, and publisher. After leading the development of the nonprofit publishing center at Amherst H. Wilder Foundation and the publishing program of Fieldstone Alliance, Inc., he founded Vincent Hyman Editorial Services, with expertise in nonprofit management, foundation effectiveness, policy, marketing, and related issues, and additional work in human services, corrections, and business writing. He is editor of scores of books, author of *The Nonprofit Risk Management Guidebook* (forthcoming from First Nonprofit Foundation), coauthor of *Preventing Binge Drinking on College Campuses*, coauthor of *Coping with Cutbacks: The Nonprofit Guide to Success When Times Are Tight*, author of numerous web and print articles, and has three decades of experience in writing, editing, marketing, and organizational communications.



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