



5450 Wissahickon Avenue, C-13
Philadelphia, PA 19144-5292

voice: 215-438-8342

fax: 215-438-0434

info@energizeinc.com

www.energizeinc.com

2011 MOWAA Annual Conference Chicago, IL

Handouts for *Executive Seminar: Positioning Your Agency for the Volunteers of Tomorrow*

August 31st - 9:00-10:30

Susan J. Ellis
President, Energize, Inc.
susan@energizeinc.com

1. What Are My Beliefs about Volunteering?
2. Executive-Level Questions to Consider...and Answer
3. Is Volunteer Involvement Supported by Top Management?
4. The Correlation between Time Donors and Money Donors (*Hot Topic – July 2010*)
5. International Web Sites for Leaders of Volunteers
6. Resources from Energize, Inc.



What Are My Beliefs about Volunteering?

(Note: There are no “right” answers, but the questions are worth considering and will impact your leadership of volunteer involvement.)

- Why is volunteering important to society as a whole? Are there any negatives?
- Why is volunteering important to my organization? Are there any negatives?
- Why is volunteering important to the individuals who volunteer? Are there any negatives?
- What do I see as the purpose of my role as an executive or senior manager as it relates to involving volunteers in our organization?
- How do I define “volunteer”?
- Are there other words I use (or even prefer) over the word “volunteer”?
- Is there anything I feel a volunteer should not be asked to do? (Why?)
- What is my feeling about the variety of “mandates” for doing service? (Court related, school requirements, etc.)
- Do valuable gifts and stipends ever cross the line into “low pay” and change volunteering somehow?
- Is volunteering a right or a privilege?
- Do I agree that “any volunteering is a political act”?
- What do I see as the relationship of work-for-pay and volunteering? How do I respond to labor union arguments against volunteering as “taking paid jobs”?
- What is (or should be) the connection between all-volunteer associations and agency-based volunteer “programs”?
- What is the relationship between giving time and giving money?
- What is the balance between my loyalty to the support of volunteers and my obligations to my organization and the clients we serve?

EXECUTIVE-LEVEL QUESTIONS TO CONSIDER...AND ANSWER

➤ **Why do we want volunteers?**

This is not a frivolous—nor easily answered—question. It is the cornerstone of developing a working philosophy about volunteers to translate into a meaningful program. Just as a mission statement articulates why an organization exists, so too must you be able to express, in concrete terms, why volunteers are a desirable part of your operation.

➤ **What kinds of volunteers do we want?**

Do we want volunteers to represent the clients/audience we serve? Are we seeking specialists or generalists? People with clout in the community? Do we recruit for diversity of gender, age, race, or other characteristics? Unless you decide what you want, you won't design work and plan a recruitment campaign to find these types of volunteers.

➤ **What are our expectations of volunteer accomplishments?**

What are our goals and objectives for involving volunteers (not just numbers!)? What outcomes do we want them to achieve?

➤ **What is our vision for the volunteer program?**

What will be the scope and size of volunteer involvement a year or two from now? In ten years?

➤ **What work will volunteers do and not do, and why?**

What criteria will we use to determine assignment areas? Will volunteers be assigned to top-level work as well as supplemental tasks?

➤ **Who will coordinate volunteer efforts?**

Are we ready to hire a full-time director of volunteers or will we appoint someone already on staff to handle this responsibility part-time? What exactly does "part-time" mean? Where will the leader of the volunteer program fit on our organizational chart (in the chain of command)?

➤ **What are resources will we allocate to support volunteers?**

Volunteers are not free help. Develop an appropriate budget for necessary expenses, ranging from printing and postage to transportation reimbursement and insurance. One way an organization demonstrates its commitment to volunteers is to acknowledge that these expenses are real and plan for them in the overall organizational budget. Beyond money, consider resources such as space, training and supervision time.

continued....

Executive-Level Questions, continued:

©2011, Energize, Inc.

- **Is staff willing and able to work with volunteers?**
Never assume that people know how to work effectively with volunteers—nor that they are happy to do so. Most employees do not learn about volunteer management in their professional education, nor is being a volunteer personally enough training in supervising other volunteers. Develop a plan to prepare everyone to work together. Allow negative feelings to surface and deal with concerns such as setting--and enforcing--standards for volunteer performance.
- **Have we considered possible problem areas and how we might react if problems occur?**
Good management practices will limit problems, but the unexpected will happen. Do you insist on screening applicants before they become volunteers? Are you willing to “fire” a volunteer?
- **At what level of growth will we reconsider the resources we have allocated to volunteers?**
Schedule regular status reviews to assess whether and how the volunteer program is changing over time. Are the original goals and objectives for the volunteer program still relevant? Is it necessary to add more paid coordinating staff?
- **Is planning for volunteers integrated with agency planning?**
Do you discuss the ways volunteers might help in new projects, while they are still on the drawing board? Do you expect the director of volunteers to be a part of your strategic planning team, helping to identify needs as well as solutions? Do you see the connection between fund-raising and “people-raising”?
- **Do I demonstrate my support of volunteers in tangible ways?**
As executive, you have the opportunity to model your enthusiasm about volunteers for everyone in your organization. Do this with more than words: ask for and respond to reports on volunteer activities; periodically meet with representative volunteers and ask for feedback; develop volunteer assignments that directly help you in your work; reward employees who are especially effective with volunteers assigned to them. Show that you think about volunteers as part of the team.

Is Volunteer Involvement Supported by Top Management? Is It Really *Support* or *Benign Neglect*?



Tell-tale signs that demonstrate the answer:

- Amount of regular executive—and board—attention.
- Articulated vision for why volunteers are wanted and what they do.
- Goals for accomplishments, not numbers.
- Organizational chart—where are volunteers?
- Staffing (at what level?) and overall resource allocation.
- Tension between employees and volunteers.
- Expectations of employee interaction with volunteers—part of the job?
- Willingness to enforce standards of performance of volunteers.
- Written policies and clear lines of authority and accountability.
- Using broadest definition of “volunteer” and designing volunteer assignments well beyond “assisting staff.”
- Reporting: what required...and what happens then?
- The planning process—where are volunteers?
- Resource development—are volunteers in the mix?
- Top management models how to work with volunteers themselves.

Hot Topics

[Hot Topics Index](#)

[What is a Hot Topic?](#)

<http://www.energizeinc.com/hot/2010/10jul.html>

July 2010

**The Correlation between Time Donors
and Money Donors**

By [Susan J. Ellis](#)

All research shows that people who volunteer tend to give more money to charity than people who do not. This often-quoted finding only tells part of the philanthropy story. As leaders of volunteers, we need to make sure our organizations see that money donors and time donors are closely intertwined – and that people move in and out of both roles over a lifetime, even within the same organization. On an ongoing basis, we need to be cultivating all supporters of our organizations because they all have the potential to contribute or connect us to money, time, expertise, and community contacts.

Start by understanding the key similarities between volunteers and donors:

- Both must be found and nurtured.
- Both must come to believe in your cause and in your organization.
- Both must value philanthropic activity.
- Both must feel that their contribution can be helpful – and then see that it indeed made a difference.
- Both need to be recognized.
- Both can generate a ripple effect of goodwill, community education, and other positive promotion to bring in even more supporters.
- Both can eventually stop contributing.

This list makes it clear that many of the activities we do in volunteer management are aligned with what the staff in the development office are doing, and vice versa.

Now consider the list of differences:

- The action desired from the donor is to give money, which is comparatively simple to do. Funds can be given online, mailed in, or telephoned and all amounts are accepted at any time. Volunteering is not "one size fits all" and is far more complicated, for both the organization and the doer. The "actions" desired range from quick help to an intensive commitment of time and talent.
- Money is easier to control than people. Once an organization receives a donor's money, it is in the bank to use. The gift of time requires continuous contact with volunteers, who need all sorts of management and are less predictable as a resource.
- Apart from some political and ethical considerations, an organization will happily accept money from just about any source – and donors expect their gifts to be accepted. Prospective volunteers must undergo an application and screening process. Not everyone is accepted or can volunteer on his or her own terms.
- Donors can contribute once and, depending on the size of their check, make an enormous contribution in a few minutes of their time. They only have to think about your organization occasionally. To have a sizeable effect, volunteers must remain involved for a duration of time. Volunteers must maintain enthusiasm for your cause on an ongoing basis.
- Giving money is a low-risk action. It certainly may diminish the donor's resources, but physically, the donor can remain far away and uninvolved – and is rarely held liable for what happens once the money has been received. Volunteering, on the other hand, can be a risky activity. The person must be engaged in the work of the organization, which brings the possibility (even if a low probability) of injury or liability.

- Donors need very little else besides money. Volunteers need skills, personality, accountability, and a schedule that meshes with the work of the organization.
- Death ends volunteering, but may generate new money.

Implications

Leaders of volunteers must position the contribution of time donors as a critical component of an organization's mix of resources. First, volunteers give expertise, care, and effort that, in themselves, allow the organization to spend all of its money and then do more. Second, the true value of volunteer time is not limited to marketplace wage equivalency. Third – and this is the point we don't make often enough – volunteers are also a potential source of money.

It is gospel in fundraising that donors must be "cultivated." While unexpected gifts of large sums are exciting, donors most often start with much smaller amounts of money. Development officers take a long-range view, nurturing regular donors towards increasing their gifts over time. The ultimate is estate planning, through which an organization knows that, if it bides its time, after the donor dies a big check is going to come in.

There is rarely similar long-range thinking when it comes to volunteers, despite evidence that cultivation of time donors leads to the giving of more time and more money. Some people move in and out of volunteering as time and funds allow during their lives. Some contribute service when they are young and have less income or, conversely, when they have the luxury to volunteer after financial success. A retired person on a fixed income may volunteer while considering a future cash gift through estate planning. The head of household who writes the donation check may encourage other members of the family to support the same cause with volunteer effort.

The moral? Never assume that volunteers have no money to give or that they will not give it!

There is also evidence that annual donors can lose interest over time, but that being asked to share their time and talent revitalizes their commitment to give money – even if they do not accept the invitation to volunteer. In addition, money may follow volunteers from their employers as matching funds and from family and friends who want to support a volunteer's devotion to a cause.

Last but not least, volunteers provide access to tangible items: donations of goods and services, loans of equipment and space (and even money), and other resources they can solicit from their employers, family, friends, and circle of contacts.

When organizations totally separate time donors and money donors – in long-range planning, staffing, budgeting, and executive attention – they are missing endless opportunities. Development officers and directors of volunteer involvement are both engaged in friend raising – cultivating supporters of their organization's mission for the long-term.

- Have you seen first-hand the connection between volunteers and money donors? Did you plan for it or did you discover it happening on its own?
- Do you and the development staff meet regularly to compare the lists of volunteers and donors and discuss what you find? How is this working for you?
- Do you ask volunteers to help you locate donations, in-kind services, and other resources in the community?
- How do we maximize the positive about volunteers leading to money without raising the negative attitude of "using" volunteer contributions mainly as a means to the end of getting cash?

[Read People's Responses](#)

INTERNATIONAL WEB SITES for LEADERS OF VOLUNTEERS (a sampling)

- 
- Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA) **www.arnova.org** (also ARNOVA-L listserv)
 - Bureau of Labor Statistics, *Volunteering in the US* annual data, **www.bls.gov/news.release/volun.toc.htm**
 - Charity Village (Canada) - **www.charityvillage.com**
 - Resource Center of the Corporation for National and Community Service - **www.nationalresources.org**
 - *Cultural Volunteer* (UK) – **http://lynnblackadder.com/cultural-volunteer/**
 - CyberVPM listserv: send request e-mail to **cybervpm-subscribe@yahoogroups.com**
 - ◆ For a list of other electronic discussion groups related to volunteering, see: **www.energizeinc.com/prof/listserv.html**
 - Energize “For Leaders of Volunteers” Web site - **www.energizeinc.com**
 - *e-Volunteerism: The Electronic Journal of the Volunteer Community* - **www.e-volunteerism.com**
 - Idealist Volunteer Management Resource Center - **www.idealists.org/info/VolunteerMgmt**
 - Ivan H. Scheier Archival Collection - **academic.regis.edu/volunteer/ivan**
 - Linda Graff’s “Musings”: **www.lindagraff.ca/musings.html**
 - Management Assistance Program for Nonprofits, section on “Managing Volunteer Programs” - **www.mapnp.org/library/staffing/outsourcing/volunteer/volunteer.htm**
 - National Volunteer & Philanthropy Centre of Singapore - **www.nvpc.org.sg**
 - Northern Ireland Volunteer Development Agency - **www.volunteering-ni.org/what_we_do/publications/**
 - Online Volunteering (UN Volunteers) - **www.volunteeringonline.org**
 - Our Shared Resources - templates, sample forms, more - **www.oursharedresources.com**
 - OzVPM (Australasian) – **www.ozvpm.com** and the OzVPM listserv: send a blank e-mail to: **OzVPM-subscribe@yahoogroups.com**
 - ServiceLeader.org - **www.serviceleader.org**
 - UKVPMs listserv: send a blank e-mail to **UKVPMs-subscribe@yahoogroups.com**
 - Volunteer Canada - **www.volunteer.ca**
 - Volunteer Development Scotland - **www.vds.org.uk**
 - Volunteer Today “Electronic Gazette” - **www.volunteertoday.com**
 - Volunteering in America - **www.volunteeringinamerica.gov**
 - Volunteering England - **www.volunteering.org.uk**
 - World Volunteer Web (United Nations Volunteers) - **www.worldvolunteerweb.org**
 - ◆ To Post Volunteer Opportunities: updated list of free registries in the US and around the world provided at **www.energizeinc.com/prof/volop.html**, including:

www.volunteermatch.org (USA)	www.idealists.org
www.govolunteer.com.au (Australia)	www.do-it.org.uk (UK)