

35 experts share what's next in volunteering

Volunteer ENGAGEMENT 2.0

Ideas and insights changing the world



**EDITED BY
ROBERT J. ROSENTHAL**

**INTRODUCTION BY
GREG BALDWIN**

WILEY

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Cover image and design: VolunteerMatch

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Published by John Wiley & Sons, Inc., Hoboken, New Jersey.

Published simultaneously in Canada.

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Library of Congress Cataloging-in-Publication Data:

Volunteer engagement 2.0 : ideas and insights changing the world / edited by Robert J. Rosenthal.

pages cm

Includes index.

ISBN 978-1-118-93188-2 (paperback); ISBN 978-1-118-93190-5 (ebk); ISBN 978-1-118-93189-9 (ebk)

1. Voluntarism—United States. 2. Voluntarism. I. Rosenthal, Robert J., 1972-

HN90.V64V643 2015

302'.14—dc23

2015001923

Printed in the United States of America

10 9 8 7 6 5 4 3 2 1

*This book is for everyone who dreams of a better world—and especially
for those who help achieve it.*

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About the Book

The volunteer engagement field is filled with textbooks showing how to model our programs on those of others. In contrast, the purpose of this publication is to help us *think differently* about what's possible—for ourselves, for our work, and for the many challenges that will rise up ahead on our journey. It's meant to be a collection of ideas and insights to help you find the way on your own path in social change.

From 2009 to early 2014 I was lucky to lead the communications team at VolunteerMatch, where, among other things, we produced thought-leadership and education programs for our network of millions of nonprofit professionals, volunteers and corporate social responsibility teams. The inspiration for *Volunteer Engagement 2.0: Ideas and Insights Changing the World* was our series of free webinars, which presented to nonprofit audiences a diverse range of thinkers who might have otherwise not been heard by those who work with volunteers. Some of the contributors to this book, in fact, first introduced their ideas to volunteer engagement audiences during those webinars, and today thousands of volunteer coordinators are putting to work what they learned there.

Nonprofit staff, volunteers, and corporate social responsibility teams have a lot in common. Some work at it full-time, others just on the weekends, and others have big budgets. But we are united in our desire to live in a just, peaceful, healthy society. At VolunteerMatch I noticed that many of the biggest ideas in volunteer engagement were coming from disciplines that were tangential to traditional volunteer management—digital communications, product development, social

media measurement, branding, and management consulting all have much to offer us. Innovation, it turns out, often moves from the outside in. The VolunteerMatch.org web service, which evolved from a pro bono project sponsored by Sun Microsystems called NetDay 96, is just one example of this dynamic principle in action.¹

I produced this book while living in a very old neighborhood in Kathmandu, Nepal. Working here was a strong reminder about the importance of leaning into the change that surrounds us. Here transformation is urgent and everywhere. But even though motorcycles and ringtones now dominate the ancient lanes, traditional ways of life grounded in family, prayer, and community are still the bedrock. Eventually those traditions will make room for more rights for Nepal's women, workers, and previously untouchable castes. Change can't be stopped—and why should it be? Indeed, Kathmandu Valley was itself once a vast lake—the basin its draining left behind became a “Shangri-La,” a place where nature provided for all.

Recognizing the interconnectedness of things, I'd like to thank each of the 30 experts who gave generously of their time for this book despite their very busy schedules. I want to acknowledge Alison Hankey from John Wiley & Sons who has been an enthusiast for this book and appreciated its embrace of the unorthodox. Greg Baldwin, president of VolunteerMatch, got behind a 300-page print publishing project even though he knows more than most just how short our attention spans have become. Dr. Sarah Jane Rehnborg and Susan J. Ellis, true leaders of volunteer engagement both, pointed me in smart directions I would otherwise have missed. Darian Rodriguez Heyman and Ritu Sharmu, two social-change makers I've previously been fortunate to collaborate with, inspired me through their own devotion to nonprofit capacity building.

I am grateful to my friends in Kathmandu, especially Annie Seymour and Tim Stewart, who have been my cheerleaders and supporters while I completed the project. And, finally, I would like to acknowledge the enormous debt I owe my mother, Marilyn, who taught me the importance of giving back.

Robert J. Rosenthal (@socialgoodR)

Note

1. For more on NetDay, see <http://en.wikipedia.org/wiki/NetDay>.

Foreword

Holly Ross

Executive Director, Drupal Association

When my friends at VolunteerMatch asked me to write the foreword to this book, I was frankly a little bit uncertain.

For six years I served as executive director at the Nonprofit Technology Network (or NTEN), which is best known for our annual technology conference and our online education programs. Since 2013, I've been in a similar role at Drupal Association, the nonprofit that supports the development of Drupal, open source software that powers more than a million websites around the world.

Neither organization seems, at least to me, to exemplify the kinds of nonprofits that would likely be reading *Volunteer Engagement 2.0*.

When we think of the word *volunteer*, we tend to imagine individuals contributing their time to physical tasks, which are in short supply at nonprofits that are focused on technology. There are no playgrounds to clean or mailers to prepare when your mission is helping people use technology.

But as I began to reflect on my own experiences supporting and leading volunteer teams, I realized that all the questions I've ever had about volunteers are *essentially the same kinds of questions* faced by everyone I know who works in the nonprofit sector. The volunteer mix may be different from my organization to yours, but the lessons I've learned over the years should be relevant for anyone who is interested in transforming their programs to keep up with the frenetic pace of our changing world.

So what have I learned? Well, if I could bundle all my experience—successes and mistakes—into one lesson, it would be this: Respect and honor your volunteers. Everything else in volunteer engagement is commentary.

So many nonprofit professionals still think of volunteers as extra man-hours. But if that's your expectation going in, you're going to be very upset. When it comes to inspiring and harnessing the time and talent of volunteers, there's so much more involved—and more potential for greatness and meaning—than that. In fact, the real importance of a book like this is its potential to help more nonprofits understand how to better work with individuals to give meaning to their experience as volunteers. What an incredibly powerful responsibility!

Here are a few other things I've learned about respecting volunteers over the years:

Volunteer engagement is a process, not an outcome. Volunteers may not always bring efficiency, speed, or ease to the process, but they will bring ideas and experience that can create a better outcome if you are willing to listen. More importantly, because volunteering is an empowering act, volunteer engagement changes volunteers, organizations and the community every day and over the long haul.

Volunteers will bring their own ideas to the table and that's perfectly fine. Very often your job is to operationalize those ideas and build a structure around them that will provide a way forward for both your needs and the volunteer.

If you ask people for their opinions, you actually have to consider them. This may seem obvious, but your volunteers will know if you're asking and not really listening. And they won't like it.

Be prepared for disruption. Have an outline of what you want to accomplish but also the flexibility to allow the process to be derailed to accommodate volunteers and their ideas.

Never take a volunteer for granted. Just because they've done some task for the last decade doesn't mean they aren't dying to try something else. Instead, seek to provide paths for great volunteers to move around within the organization. Otherwise one day they'll move on.

Get to know your volunteers so you can reward them. Real respect means knowing your volunteers well enough to understand the human need that

motivates them to be involved. Then you can give them the rewards and recognition that meet their needs.

Respect can only exist in relationships. With this in mind, sometimes it can be helpful to leave the boundaries of your institutional identity. Remember that a nonprofit organization, after all, is no more than a collection of people who are working together to solve some problem. Some do the work full time; some volunteer. But we are all connected through the cause we care about.

This, by the way, is why VolunteerMatch is the perfect organization to present a book like *Volunteer Engagement 2.0* to you. VolunteerMatch works at that magical place where engagement of volunteers first takes place. Through their network of hundreds of websites, the team at VolunteerMatch can actually see thousands of connections take place each day, and they have statistical evidence of what happens when a relationship flourishes and when it doesn't.

For VolunteerMatch, “respect” in volunteer engagement means being just as obsessed with helping nonprofits find a great volunteer as with helping volunteers find a great opportunity. Moreover, in always being willing to share and build bridges, VolunteerMatch is fundamentally an unselfish organization—which, to me, explains the willingness of so many of the field's great minds and experienced practitioners to take part in this book.

Ready to get started? Read on and engage.

Holly Ross

Holly Ross is the executive director at the Drupal Association. Holly has spent her career working with nonprofits and technology and comes to the Drupal Association after a 10-year tenure at NTEN: The Nonprofit Technology Network. She is thrilled to work with a community that shares her passion for using technology to make great things happen in the world.

Introduction

Greg Baldwin

President, VolunteerMatch

“Act as if what you do makes a difference. It does.”

—William James

Democracies are made *possible* by the rights of free speech and assembly, but they are made *great* by those who use these freedoms as an opportunity to make a difference. If you are one of those people, or want to be one of those people, this book is for you.

Don't worry—this isn't going to be a book about the importance of volunteering, or a patronizing analysis of why people don't do it enough. It won't be a book about why volunteers are so often taken for granted or why the people who lead them don't always get the respect they deserve. This isn't a book about what volunteering has been—it's about what it can become.

Let's start with where we are. The most recent data from the Bureau of Labor Statistics estimates that about 25 percent of the U.S. population volunteers each year.¹ There are two ways to understand that number—the old way, and what is emerging as the new way.

In the old way this 25 percent is pictured as an idealized group of virtuous citizens who set aside their own selfish interests to address society's pressing social issues. Unlike everyone else, this 25 percent has managed to transcend—or

perhaps not fully understand—the biological, social, and economic realities of self-interest.

Volunteers, after all, are often celebrated precisely because we see them acting contrary to the idea that we are hardwired to be self-interested.

Look around: As a result of this frame of reference you'll notice how much energy we spend as a society trying to figure out how in the name of reason, science, and progress we can convince more people to set aside their selfish ways to look after the common good. Or, as Richard Dawkins, author of *The Selfish Gene*, suggests, "Let us try to teach generosity and altruism, because we are born selfish."

And so the volunteer rate becomes a kind of scorecard for how well the effort to overcome human nature is going.

When we launched VolunteerMatch in 1998 we understood the logic of the old way, but saw a very different possibility emerging. What we saw to be true didn't square with this conventional wisdom.

Because our own experiences volunteering didn't seem to involve an effort to overcome an instinct for selfishness, we didn't see ourselves as heroes. In fact, volunteering at its best didn't even feel selfless at all—it was *fulfilling*, a word that indicated how much we were receiving from this supposedly selfless act.

We saw the fact only one in four Americans volunteer not as a measure of how hard it is to get people to volunteer, but as a reflection of the opportunities available to do it. We assumed that, like us, other people want to make a difference; our role wasn't to talk them out of being bad, it was to better organize the opportunities to do good.

We saw the possibility that maybe people are more complicated than science said. Technology would transform how people organize around things they care about. Businesses would take a more active role in social change. We saw that volunteering wasn't about the *importance of doing something for free*, it was about *the freedom to do something important*.

Since then, these emerging possibilities have become real:

- Science is discovering new evidence about the nature of altruism and generosity.
- Changing business models and new organizational imperatives are emphasizing the value of workplace giving and engagement.

- Technology is bringing scale, efficiency, and choice to the marketplace of engagement while reducing the barriers of place and time.
- Changing corporate strategies are realigning the relationship between profit and purpose. Workplace volunteer programs are bringing more specialized skills and pro bono resources into the volunteer candidate pool.
- Decades of trial and error and better measurement tools are informing new models of success and new methods of evaluation.
- Government, at least in the United States, has opened a path to enhance and extend the role it plays in supporting effective volunteering.
- And what was once an ad hoc field of practitioners has matured into a profession with research-based core competencies, a formalized code of ethics, and a well-regarded certification program.

At VolunteerMatch we still believe that people want to do good and that everyone should have an opportunity to make a difference. We've spent the last year putting together *Volunteer Engagement 2.0: Ideas and Insights Changing the World* because we know you are up to big things and people are more important than technology.

We've put this book together to update you on the state of volunteer engagement and hope that it will inspire you to leap beyond it. We've organized the ideas, insights, and inspiration you will need to transform your own ability to successfully engage the world today.

To keep up with and unpack the significance of all these changes we've invited the wisest people we know to share their perspective and advice. We organized their contributions into five sections that each explore a different aspect of the changing environment.

Part One: Changing Times puts volunteering into historical context. It explores the roots of giving time for social change, the myths that hold us back, the trends shaping the future, and the attitudes and expectations of volunteers young and old. In Part One, you will see how science is changing the way we think about altruism, why so few organizations invest in exceptional volunteer engagement, and what draws millennials and baby boomers to volunteer.

Part Two: Changing Relationships explores how to think differently about the connection between people and causes. It looks at the art of keeping supporters

engaged, why to link volunteering and philanthropy, building a culture of engagement, and working effectively with supervolunteers. In Part Two, you will see how to build better relationships with your volunteers, why volunteering and giving multiply each other, and what it takes to transform a board of directors.

Part Three: Changing Technology tackles the digital tools and communications technologies that have accelerated the possibilities of volunteering. It covers the promise and pitfalls of social media, practical approaches to microvolunteering, the evolution of virtual volunteering, and settles once and for all the great debate over the value of hackathons. In Part Three, you will see how technology has changed the practice of volunteer engagement, why it is creating new forms of service, and what it takes to harness the possibilities and cut through the hyperbole.

Part Four: Changing Corporate Perspectives illuminates how businesses are rethinking their values, strategies, and relationships. It reveals changing attitudes among business stakeholders and the new opportunities this creates for communities and causes. It underscores the untapped potential of skilled and pro bono volunteering, the logic of volunteering as employee engagement, the growing alignment between purpose and profit, and the power of partnering to advance a cause. In Part Four, you will learn why so few organizations make use of skilled and pro bono volunteers, how smart companies approach cross-sector partnerships, and what prevents many causes from engaging the talent and marketing might of business.

Part Five: Changing Strategies takes a closer look at what makes good programs great. It demystifies measurement and assessment; takes a fresh look at the 3 Rs of recruiting, retention, and recognition; brings the power of national service for building capacity into full view; unlocks the engagement secrets of high-performing nonprofits; and offers a practical road map for career advancement. In Part Five, you will see how measurement and data improve performance, why effective volunteer engagement is so strongly correlated with overall organizational health, where national service fits in, and what it takes to earn a Certification in Volunteer Administration (CVA).

Thank you to everyone who has contributed to this effort. It has been a remarkable affirmation of the generosity of even the busiest people. Your work and the possibilities ahead have brought out the best in all of us.

We believe in you, so let's get started.

Greg Baldwin

Greg Baldwin is President of VolunteerMatch, the web's largest volunteer engagement network. Greg joined the founding team in 1998 as its Chief Imagination Officer to make it easier for good people and good causes to connect. As president, Greg oversees an organization that helps 100,000 nonprofits, 150-plus companies, and more than 12 million interested volunteers each year. Since 1998, VolunteerMatch has helped the nonprofit sector engage more than \$5.4 billion worth of volunteer services. Greg completed his undergraduate studies at Brown University in 1990 with a degree in Public Policy. He is a lifelong volunteer and lives in Berkeley, California, with his wife, Kathryn, and kids, Ellie, and Matt.

Note

1. U.S. Bureau of Labor Statistics, "Volunteering in the United States, 2013," February 25, 2014, www.bls.gov/news.release/volun.nr0.htm.

PART ONE

Changing Times

Chapter 1

Big Shifts That Will Change Volunteerism for the Better

Tobi Johnson, MA, CVA
President, Tobi Johnson & Associates

“The future belongs to those who believe in the beauty of their dreams.”¹

Fifteen years ago, I was given the opportunity to build my first nonprofit program from scratch. At the time, I was short on experience but had enthusiasm and ideas to spare. Fortunately, the leadership team at Larkin Street Youth Center decided to take a chance. Founded in 1984, Larkin Street had already grown an impressive continuum of services and a solid reputation with San Francisco’s street youth. The link between housing, support services, and lasting employment, however, was yet to be made. So, I set about developing a workforce-development program for homeless youth.

Larkin Street’s team of dedicated social workers created a culture of youth empowerment through acceptance, encouragement, and a little bit of tough love. The youth responded in kind, some so committed they returned to job readiness class every morning even when they slept in Golden Gate Park the night before. It was truly inspiring, but we also needed to reach outside our walls for support. Our clients needed additional champions to believe in their potential.

When we asked, people helped. A team of volunteer attorneys from the San Francisco Bar Association became our first group of mentors. Employee volunteers from Bain & Company organized a job readiness fair. Employers like Macy's hosted informational interviews and hired youth for internships. Community volunteers helped as tutors in our GED and college-prep classrooms. Because of the first year of success—impossible without this level of volunteer and community involvement—our primary funder committed to multiyear support.

Fifteen years later, Hire Up continues to help homeless youth find a way off the streets. A lot has changed since then, but in some respects, much remains the same. The help that communities can offer remains critical to nonprofit success, and volunteers still willingly contribute their skills and talents to good causes. At the same time, the world has changed dramatically. Some might view the complexity of today's era as a liability. I see new advances as opportunities to forge even deeper connections with supporters who can offer so much value, helping lift programs, such as Hire Up, off the ground and keep them running.

Today, I help my consulting clients strengthen their own volunteer programs. Over the years, the social sector has experienced an evolution in the needs of volunteers, and our responses to those needs are transforming our practice.

Today's Consumer Is Tomorrow's Volunteer

We live in a complex era. Paradoxical themes of anxiety, self-help, rebellion, and collaboration are crosscurrents that embody today's experience. Futurists highlight many trends that may seem contradictory, such as:

- Superpersonalization versus “clanning” and tribes
- Indulgence and luxury versus environmentalism
- Focus on self- versus social awareness
- Escapism versus wellness and health consciousness
- Hyperconnectivity and multitasking versus simplification and mindfulness²

In spite of these tensions, or perhaps because of them, a “socially conscious consumer” has emerged. Ideas like fair trade, sustainable consumption, farm-to-table, and ethical fashion are gaining popularity, as the public strives to express their values and perhaps reconcile conflicting emotions. In turn, this trend has

stimulated increased interest in corporate social responsibility and cause marketing, which offer even more choices to act on one's ideals.

We are in the midst of other big shifts in business, technology, psychology, and communities as well. Although consumers present a range of reactions to the speed and breadth of change—from joyous early adopters to anxious resisters—all have increasingly sophisticated expectations from the world around them. This extends to the nonprofits they choose to support. In this environment, volunteer programs are particularly vulnerable.

This chapter is intended to inspire deeper thinking about the current and future contexts of volunteer engagement and community involvement. By examining and capitalizing on new trends and recent discoveries across a wide range of disciplines, we can collectively revamp and refresh the field of volunteerism for the better. Each big trend that follows is accompanied by several ideas for action. Is your organization ready to harness the power of tomorrow's social citizens?

What Can Volunteerism Lose to Win?

Although there has been substantial growth in new nonprofits in the United States, expanding from 1.32 million to 1.44 million from 2002 to 2012 (an increase of 8.6 percent), volunteer involvement in organizations has decreased slightly and is at its lowest since 2002 (at 25.4 percent), and annual volunteer hours have been declining slightly.³

Altruism, on the other hand, appears to be on the rise. In 2011, over 65 percent of citizens said they helped their friends and neighbors (an increase of 9.5 percent over the previous year).⁴ Although it is not entirely clear what is driving this trend, it may indicate that community participation is alive and well, but that current offers to volunteers by nonprofits lack appeal. It also suggests that informal, self-directed volunteering (“freelance philanthropy”) and the flexibility and autonomy it allows may be preferred.

As society evolves, so, too, must volunteerism. Old habits die hard, but letting go helps make way for new ideas and unforeseen discoveries. Legacy mindsets may be obstacles to progress and bear examining, such as:

- Focus on individual volunteers versus team approaches
- Over-reliance on long-term volunteer placements over project-based work

- Increasing rigidity versus flexible, nimble management
- Reluctance to accept risks inherent in innovation
- Unequal power dynamics between organizations and citizens in planning and implementation of community solutions
- Assumption that answers to challenges must (or will) come from within our sector

The world will continue to revolutionize and renew itself, and we must heed the call for transformation. To break new ground, cross-disciplinary thinking is useful, along with a willingness to experiment and learn from failure.

Big Trend: New Insights from Brain Science

With the advent of imaging technology, scientists have made monumental leaps in what we understand about how our brains work. In the growing field of neuroscience, researchers have only scratched the surface, but several recent discoveries hold promise for volunteer organizations.

All human brains, not affected by trauma or illness, operate in the same way, regardless of culture, language, geography, or any other trait. Over 95 percent of our emotions, learning, and decision making occurs on the subconscious, rather than on the rational, level. Organizations are using these discoveries to their advantage, paying close attention to the “ecology of experience” that workers and customers encounter. Some have been deliberately designed for behavior change, working to create brain-friendly workplaces and using brain science to help guide marketing decisions and generate more persuasive ad copy.

The Compassionate Instinct⁵

Despite being characterized as selfish in nature, new findings show that humans actually have a “compassionate instinct.” Compassion is an emotional response to suffering and involves an authentic desire to help. When we alleviate another’s pain, or even watch someone else assist, the brain’s reward center lights up.

The adage “giving is better than receiving” applies anywhere the world, regardless of country or socioeconomic status. Scientists argue that compassion is deeply imbedded in human nature and has helped us survive as a species. Compassion is also contagious. When we perform compassionate acts, our heart

rate slows and hormones are released that promote bonding and a feeling of “elevation.” The more one experiences or witnesses compassion, the more likely they are to act compassionately.

With the rise of the socially conscious consumer, our compassionate instinct now manifests itself in society. Volunteer programs can also inspire and channel our natural inclinations to help by making examples of their benefits to the community even more public.

Neuroleadership Models⁶

Neuroleadership is an emerging field that uses brain science to better understand how to motivate, influence, and lead others. Researchers argue that minimizing danger and maximizing reward is a key organizing principle of the brain. The urge to approach possible rewards and avoid potential threats is deeply ingrained.

The SCARF Model, developed by neuroleadership theorists, is based on addressing the threats and rewards that are most important. The model includes five domains that activate the brain’s circuitry:

1. Status—our relative importance to others
2. Certainty—our ability to predict the future
3. Autonomy—our sense of control over events
4. Relatedness—our sense of safety with others
5. Fairness—our perception of fair exchanges between people

Neuroleadership has particular value in leading volunteers, and its remedy is simple. The more we perceive reward, the more we are able to collaborate and influence others. The more we feel threatened, the less likely we will be able to successfully team. Some volunteer management and training methods may unwittingly stymie the perception of reward for volunteers.

The Power of Peers

Peers as well as leaders influence behavior. Researchers now assert that group dynamics are even more powerful than we realized. No matter what our age, we are heavily influenced by what others think, and we have a fundamental need to maintain in good standing within our groups. Scientists argue that this desire to belong has evolved from a basic need for survival.

Although most of the time we maintain our standing, there is often a conflict between what we find enjoyable and what the group expects. Threat detection, as with the SCARF Model, becomes an important social skill. We scan our environment to determine whether there are signs of social acceptance and use these clues to monitor and adjust our actions accordingly.

The broadcast power of social media can magnify the effects of peer influence, both positively and negatively. Within volunteer programs, we can mitigate peer influence and reduce the stress of peer pressure by making organizational norms clear for new volunteers and fostering a culture of acceptance.

Ideas for Action

- Foster altruism by sharing stories (in videos and photographs) that exemplify compassion in action.
- Invite prospective volunteers to participate in a group volunteer project before they join to inspire compassion and commitment.
- Design volunteer onboarding so that it reduces threat and increases certainty and relatedness.
- Involve volunteers directly in strategic planning so they have increased certainty about the future.
- Review volunteer program policies to ensure that each is perceived as fair and equitable.
- Expand levels of autonomy to match a volunteer's knowledge and life experience.
- Use volunteer mentors to decode "unwritten rules" for newcomers.
- Train volunteer-led recruitment teams and speakers' bureaus.

Big Trend: Demographic and Generational Changes

Demographic shifts will undoubtedly affect society and volunteerism. By 2060, the United States will, for the first time, be comprised of more people of color than whites. Recent immigrants will make up more than a third of the