



*The*  
**VOLUNTEER  
MANAGEMENT  
HANDBOOK**

SECOND EDITION

**Leadership Strategies  
for Success**



Edited by  
**TRACY D. CONNORS**

**+ WEBSITE**





# The Volunteer Management Handbook



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*Leadership Strategies for Success*

**SECOND EDITION**  
**EDITED BY**  
**TRACY DANIEL CONNORS**



WILEY

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To Faith Raymond Connors,  
my beloved “volunteer  
resource manager” for over 50 years





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# Preface

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Nonprofit organizations (NPOs) provide the majority of human services in the United States—collectively called “quality of life.” Better management and leadership within these organizations directly contribute to an improved quality of life for millions of Americans. This has been the overarching goal of the many books, articles, and training courses that have been developed in recent years focused on NPO and volunteer management (Connors, 2010a).\*

It has been slightly more than 30 years since the first *Nonprofit Organization Handbook* was published (Connors, 1980). The handbook’s organization, fulfilled by 28 contributors, established for the first time the fact that regardless of the specific public service provided, not-for-profit organizations shared seven areas of management—from fundraising to volunteer administration.

“Volunteers: An Indispensable Human Resource in a Democratic Society” was the title of the section in the *NPO Handbook* that covered all major areas of volunteer management and administration. All five of the chapters in that section were written by Dr. Eva Schindler-Rainman, a gifted visionary in several fields. A brief overview of her remarkably accurate predictions made in 1980 about the world of volunteer resource management provides a benchmark against which we can both measure progress and chart a course into the future:

- Volunteers will be in every sector of the community, Schindler-Rainman predicted, all over the country, and they will be affecting policy making, changes, and growth.
- New courses will be offered in community colleges and universities for administrators of volunteer programs as well as for volunteers themselves.
- Credit will be given for volunteer work. (Agencies will keep track of what volunteers do so that volunteers can include this experience in their resumes.)
- Research on values and the effect of volunteers on the delivery of human services will increase.
- New collaborative bodies will emerge to utilize better the human and material resources that are available.
- New, portable, interesting, participative training programs for paraprofessionals, professionals, and volunteers will be developed.
- New ways to recognize volunteers will be developed (Schindler-Rainman, 1980, pp. 3–7).

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\* Portions of the introduction to the preface are based on a 2010 article by the author published in the *International Journal of Volunteer Administration* (Vol. 25, No. 1). Used with written permission of the editor of *The International Journal of Volunteer Administration*.

“This is probably the most exciting time in the history of the United States to be active in the volunteer world,” Dr. Schindler-Rainman concluded her prescient perspective. “These times offer a tremendous opportunity for volunteers to make important contributions to the quality of life and to human services in their communities. It is clear that the volunteer administrator is a key person in translating the motivation, interest, resources, and skills of volunteers into human services to the clients of our people-helping agencies and organizations.”

## The Present of Volunteer Resource Management

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A work such as this handbook is designed for both the present and the future. As an “answer book” for volunteer resource management, it attempts to provide useful perspective and guidance for current issues as well as to anticipate—and cover—where possible, those trends, issues, and developments that lie ahead for this important area of management.

Despite the challenges and pressures of America’s struggling economy, Americans are still volunteering in record numbers. Their generosity and willingness to serve their communities account for a significant proportion of the enormous variety of human services provided by the nation’s voluntary action sector. As our economy has slowed and charities have struggled to provide services based on budgets that were ever more constrained, volunteers have become even more vital to the health of our communities and their ability to sustain quality of life for their citizens. Most charities that use volunteers to provide all or a portion of their public services and mission fulfillment report they are increasing the number of volunteers they use. This further validates how important volunteers are to any nation depending on voluntary action organizations to provide an astonishing variety of services on which many aspects of national quality of life are based. In addition to the invaluable services delivery contributions volunteers provide, they are also much more likely than nonvolunteers to donate to a charitable cause.

### Assessments and Projections

As we move into the second decade of the 21st century, any assessment and projection of volunteer resource management should begin with the professionals currently leading in this important field. Much of this overview is derived from a 2010–2011 “Future of Volunteer Resource Management Study” conducted by the author to provide new, more specific data from volunteer resource manager (VRM) professionals (Connors, 2010). The data were derived from a convenience sample but represented a wide range of VRM professionals across the country and from Canada, England and Australia. The generalized findings were used to support initiatives by the Council for Certification in Volunteer Administration, ARNOVA, and the Florida Association of Volunteer Managers.

A profile for a typical respondent to the survey would include these characteristics:

- Annual budget over \$500,000.
- Volunteer program size range from 100 to more than 250 volunteers.
- Staff size range from 10 to more than 25.



- The majority of respondents conducted program operations in metropolitan areas of 100,000 to more than 500,000 residents.
- More than half of the respondents (52%) were currently serving in volunteer resource management positions, with strong representation from others serving as academic faculty (14%), executive directors (12%), or consultants (10%).
- A significant majority (64%) reported more than 15 to 20 years' experience in the field of volunteer resource management and in nonprofit management (56%).
- Virtually all respondents reported professional affiliations at local, state, and national levels.
- Professional responsibilities largely included volunteer resource management (85%), but many were also charged with responsibilities in such areas as resource development (63%), human resource management (41%), NPO management (44%), or as a member of the board of directors (29%).
- Finally, a majority (53%) expressed a preference for the professional title of "manager/director of volunteer resources," followed by "director of volunteer services" (20%).

### Resources Needed by Volunteer Resource Managers

A convincing majority of the respondents requested additional resources in such areas as:

- Distance education courses in volunteer management (75%)
- Graduate courses in volunteer resource development/management (66%)
- Undergraduate courses in volunteer resource development/management (56%)
- Distance education courses in NPO/charitable organization management (54%)
- Graduate courses in NPO/charitable organization management (54%)

### Career Progression

Volunteer resource management was seen very strongly (90%) as an important credential and career stepping-stone to senior management positions in the voluntary action organization. Barriers remain, however, for most VRMs in their efforts to have programs recognized for their true potential as a major contributor to the organization's strategic objectives. For example, most managers (48%) have inadequate access to the organization's chief executive and operating officers. Other managers need more training in such management areas as strategic planning and implementation (71%). Many volunteer resource programs remain underappreciated and underdeveloped regarding their strategic potential to the organization's ability to fulfill its public service mission. Finally, the great majority of VRMs (84%) reported not being included in top-level planning by the senior management team. The latter can easily become the proverbial self-fulfilling prophecy and argument in circulo. "We don't invite our volunteer coordinator to senior staff meetings because the volunteer program doesn't generate any funds, and has little connection or relevance to our organization's big picture operations."

Most of us will clearly see the fallacy of such "reasoning." Without having a better understanding of the organization's big picture, the VRM will find it a challenge, to say

the least, to connect the dots between the volunteer program and other program activities and organizational goals and therefore to optimize the potential to contribute more fully to the organization's mission fulfillment. In many NPOs, the personnel person at senior staff meetings is typically the human resources manager. There could be many reasons why this individual—responsible for paid staff—might not see his or her responsibility as that of an advocate for the volunteer resource program and its role in the organization's operations. Until the volunteer resource management position is that of a department head, far too many nonprofits will fail to fully realize and develop the potential inherent in their corps of volunteers. There needs to be “a greater sense of volunteer resource management as a management-level responsibility within organizations—not simply tacked on to some other job description or relegated to non-decision-makers” (Connors, 2010b).

### Senior Executive Track

Within the field of NPO management, there is growing recognition that successful managerial experience as a VRM should be more highly valued as a qualifier for senior executive positions. A related awareness is how important the volunteer resource program is to the organization's ability to fulfill its mission, as evidenced by the increasing number of organizations that establish volunteer position descriptions that are highly correlated to their mission, purpose, and strategic plan.

Even as the number of business and public administration courses focusing on volunteer resource management is increasing, wasteful and shortsighted misconceptions at the organizational level can be found in too many nonprofits: for example, “We need a volunteer administrator to schedule volunteers for open shifts.” However, more organizations are recognizing volunteer resource management as a department head-level organizational function, alongside development, marketing, and operations. A broader awareness and understanding regarding the contributions of VRMs to organizational success recognizes the shortcomings of prior assumptions, such as “volunteer management [is not as important as other departments because it] doesn't generate any money for the organization.” In fact, volunteer resources, when given the full assessment they deserve regarding their many contributions to overall organization mission fulfillment, are seen as vital components of services delivery, membership recruitment, donor base, and community image/support.

Volunteer resource management is not only seeing stronger trends of professionalism within the field but is increasingly recognized as a stepping-stone to more senior responsibilities within the organization. However, preparing current VRMs for future senior executive positions will require more diversification of their education and experience to include much of the same managerial knowledge base now available to and expected in more senior leaders of charitable organizations. It will also require moving from a predominant management perspective, to a leadership perspective regarding volunteer resources.

Meanwhile, career burnout and turnover issues are seen as major problems (87%), and their causes remain to be addressed, including: budget cutbacks (65%), inadequate salaries for VRMs (72%), burnout (72%), and lack of career progression identification (i.e., establish an identified career track for VRMs to senior nonprofit management positions) (75%). Other contributors to turnover (20%) include: lack of

respect “within the management structure”; “lack of value for what we do”; funding positions on “soft money,” thus adding doubt about future commitment and continuity; unrealistic expectations by chief executives and executive directors expressed by “the more, the better” mentality; and lack of positive feedback: “[I]f the person isn’t getting positive feedback from the organization, there is no payback—people move on!” (Connors, 2010b).

## Expanding Options and Opportunities

Opportunities for volunteer engagement and participation are growing in number and in scope. In addition to traditional volunteer opportunities, most organizations have seen the inherent value in expanding their opportunities for episodic volunteering, virtual volunteering, and corporate volunteering. These new opportunities have required additional management responsibilities for professional VRMs and more focus on internal coordination to ensure effectiveness.

The population and cohort bases from which potential volunteers are drawn are expected to steadily expand. The number of active volunteers is projected to increase more rapidly among such groups as “boomers” and minority populations, many of whom have not traditionally been greatly involved in volunteerism. More seniors and early retirees are expected to participate in the volunteer service experience. Increases are also projected in episodic and group volunteering, coupled with significant increases in the use of social media to communicate with volunteers and to build organizational relationships. Also, unemployed individuals may represent significant potential volunteer resources as they maintain professional skills, add additional resume competencies, and remain meaningfully engaged in worthy activities supporting their community.

## International Volunteering Trends

As the capacities of the social media grow to include ever-improving capabilities to coordinate basically spontaneous responses, a new type of international volunteer is appearing. Some have referred to them as “spontaneous”—unaffiliated or entrepreneurial volunteers—particularly for involvement in disaster relief. How will volunteer resource management deal with this type of volunteer and opportunity—how do we attract and engage these independent, individualistic, creative individuals, and to what extent should we involve them in our organization and the structure or adapt our programs to fit their emerging needs? As these spontaneous and other volunteers with a global focus continue to serve in expanding international roles—some having global reach and impact—what changes, if any, do we see ahead in such areas as management practices, training, education, and program planning?

For those countries lacking terms or concepts for volunteerism, should we not develop definitions, roles, and complementary core values that promote more effective transference of volunteerism across cultural lines to fulfill its international potential? We must also be alert to the concerns expressed by some who are dubious of international roles for volunteers and their impact on more locally focused nonprofits. Whether considered at the community-based or international levels, volunteers are partners, collaborators, hands-on providers of human services working in a local

context. To some, the global reach and impact of volunteerism appears to be and “feels like” activism. Volunteers for these international causes or organizations are seen to be energized by a much broader and more complex set of motivators than are local volunteers.

### Professional Development Evolution

Nonprofits with highly successful volunteer resource management programs report strong correlations between the results achieved by those programs and the professional training and experience of their VRMs. In short, successful volunteer management programs—those that contribute significantly to the organization’s success in fulfilling its mission—are strongly correlated to the education, training, and experience of their professional VRMs. Can that really be surprising?

Overall, professional development opportunities for VRMs are expanding and improving, with colleges and universities adding a growing number of training and education opportunities. However, their quality, comprehensiveness, and consistency need continuing focus by national organizations.

As the field of volunteer resource management continues to evolve and mature, we should align our efforts to bring more consistency across the discipline, particularly in training and education. The continuing national dialogue regarding the importance and future of volunteer resource management should bring about more general agreement regarding the role and relationship of volunteers throughout the organization, more agreement on the overall business model for the field, and more agreement regarding the overall body of effective management principles and practices.

Professional development evolution career ladders for VRMs should be identified, defined, and supported by higher education and credentialing to provide not only fundamental skills but meaningful professional development.

Fortunately, volunteer resource management is now far more frequently recognized as a professional specialty, and the tools and opportunities for acquiring professional credentials, education, and status are increasingly available. Currently, and we hope temporarily, in many areas, the need for volunteer managers has outpaced the ability of the professional VRM pipeline to provide enough qualified professionals. Many organizations have resorted to filling what should be a post for a VRM with a far less experienced and qualified staff member to serve as a volunteer coordinator or volunteer administrator. Providing adequate professional development education and training in this field will remain a challenge for the foreseeable future.

Additional research is needed to demonstrate the value added and the significant impact of effective strategic volunteer engagement. Concurrent research is needed to identify and quantify the additional value added provided by professional VRMs versus those lacking that education, training, or experience.

The training, education, management, and more effective leadership of volunteers should be better understood and recognized as vital contributors to the organizational effectiveness of charities whose human services help our societies achieve and sustain meaningful quality of life. This point also argues strongly in favor of a higher priority for professional development of the VRM.

## Adaptive Management Practices

Successful VRMs are learning to be more effective while managing and leading within dynamic, fluid program environments that often require direct and immediate responses to constantly changing local needs or organizational priorities affected by an evolving, and sometimes threatening, operating environment. For example, VRMs will need to hone program management skills that will enable them to recruit and manage volunteers remotely through such media as social networking. Further, many VRMs are managing programs that rely more heavily on short-term volunteers, since fewer volunteers are able—or willing—to commit to long-term volunteer engagement. VRMs must be prepared to deal with larger numbers of volunteers on a short-term basis. This reality also requires additional attention to such factors as risk management (increasing scrutiny of program activities for potential liability), appropriate training, and scheduling—more volunteers cannot commit to a fixed schedule. Finally, many volunteers see themselves more as partners than as resources to be managed.

The ongoing national focus on improved efficiency, effectiveness, transparency, and accountability by all nonprofits—with particular emphasis on those organizations that accept public funding—will also affect volunteer resource programs. This national focus will be reflected within volunteer resource management by sharpened interest in our ability to measure program outcomes, and to demonstrate the overall value of volunteer participation. A potential danger here rests in the use of models and program measures derived from the for-profit sector that may not represent an appropriate fit when applied to human services delivery by public charities.

## Program Planning Trends

Volunteer position descriptions will need to be carefully considered not only for their relevance and correlation to organizational mission fulfillment and strategic planning but also in their ability to interest and attract volunteers who will not be satisfied with envelope-stuffing responsibilities. Today's volunteers increasingly seek service opportunities offering some growth or learning potential or that might offer some potential for a paid position. Not surprisingly, volunteers want to know what they accomplish for the organization or its clients (i.e., what difference they made as a result of their service). Further, many volunteers see themselves as not simply drudges but as leaders and decision makers who feel strong connections to the organization, its mission, and its overall contribution to the community's quality of life.

## Technology Vistas

Technology will continue to offer more efficient and effective options within volunteer resource management for those professionals willing to stay abreast of evolving applications and to consider innovative approaches to its programmatic use. For example, it is clear that the ability of advancing technology and networking capabilities to provide instant access to information and coordination through communication is vital to both volunteers and VRMs. We can expect to see more results and

program success attributed to a creative focus on effective use of information management and communication technology throughout the volunteer resource management process—from recruiting and accession, and options and scheduling, to recognition and program evaluation.

Advances in communications and information management technologies have made it possible for many organizations to move to less in-person training by the volunteer manager to more training on the job and/or online, much of it coordinated by volunteers supervised by the professional manager.

### **Synergy of Personal Contact**

While there is no denying the power of the growing number of social networking media available for use in a volunteer resource management program, many practitioners remain convinced that people miss the powerful synergy of personal contact—a phone call, a knock at the door, reaching out. Why else, they ask, do so many volunteer organizations and centers have such great success with a weekly or monthly coffee club as recruiting and orientation opportunities for programs and projects? How can such retro ideas such as neighborhood groups and block parties be successfully integrated with the resources inherent in social networking?

## ***Volunteer Management Handbook***

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### **Growth of Volunteer Resource Programs**

The great majority of the nation's NPOs (those with incomes above \$25,000 annually in gross receipts) depend on volunteers to provide an enormous range of services that are essential to the organizations in fulfilling their public service missions. In addition, volunteers brought significant benefits to 90% of these major nonprofits, with two-thirds reporting substantial cost savings and increased quality of services and programs (AFP eWire, 2004).

Clearly, every day across the United States, countless numbers of NPOs are either considering starting a volunteer resource management program for their organization or assessing their current program to ensure that every possible contribution it might make to the organization's mission fulfillment is optimized. As Pynes (2009) explains:

*[V]olunteers are an attractive resource for agencies because they cost little, can give detailed attention to people for whom paid employees do not always have the time, often provide specialized skills, provide an expansion of staff in emergencies and peak load periods, enable agencies to expand levels of service despite budgetary limitations, and are good for public relations.” (p. 117)*

### **Walls to Bridges**

Information technology (IT) continues to change and expand the ways in which the world communicates, leads and manages, and interacts. Today we consider a wide variety of social media as business as usual and expect to be able to access virtually

every product, and most information, online and retrievable at a moment's notice. Yet a few moments' reflection will bring to mind the fact that not long ago, these expectations were barely conceived, much less considered commonplace.

Not long ago, a book or publication was considered through a long lens that stretched back to Gutenberg and the days of hand-carved wooden type. In a relatively short period of time, as a direct result of advancing information technology that has brought us instant online access and retrieveability, our concept of a publication has expanded far beyond that of printed pages contained within a front and back cover.

Traditional publishing requires creation of a printed-on-paper, bound-with-plasticized-covers, "linear" product that must be boxed, stored, shipped/handled, and "consumed" cover to cover. These ever more costly attributes increasingly represent walls for reader/users, subject matter experts wishing to share their expertise, and publishers trying to meet the needs of their customers for answers and information. Digital publishing offers significant advantages through its economical use of resources, availability, and online access for users to up-to-date information and the ability to include the perspectives and viewpoints of more subject matter experts in a single "publication." In fact, the advantages of digital publishing are changing the former walls of traditional publishing into bridges to the future.

## Modeling the Future of Volunteer Resource Management

The second edition of the *Volunteer Management Handbook* takes full advantage of the expanding capabilities offered by IT and digital publishing. A work such as the handbook is designed for both the present and the future. As an "answer book" for volunteer resource management, it attempts to provide useful perspective and guidance for current issues as well as to anticipate—and cover—where possible, those trends, issues, and developments that lie ahead for this important area of management.

The volunteer resource management cycle is a process that begins with organizational assessment and planning and concludes with volunteer program assessments to evaluate its effectiveness and to incorporate those findings into program improvements. Exhibit I.1 illustrates the fundamentals of volunteer resource management (despite the limitations of a linear diagram). The illustration suggests the general phases and sequence of the typical, cyclical process. Volunteer resource management should not be considered a one-time process or exercise. Instead, volunteer resource management planning in various forms and degrees should reflect an ongoing, dynamic, iterative process that would be more accurately represented by a diagram such as that first proposed by Walter Edward Shewart in 1939.

Sometimes called the Shewhart cycle or the (W. Edwards) Deming wheel, after the acknowledged founder of quality management, it is most often referred to as the PDCA cycle, or Plan-Do-Check-Act (Scherkenbach, 1990). In this case, a PDCA approach to volunteer resource management planning moves cyclically through four stages: assessment/analysis; planning; strategic deployment and implementation; and results and evaluation. The assessment-planning-implementation-evaluation process for volunteer resource management begins with organizational assessment and planning and concludes with volunteer program assessments to evaluate its

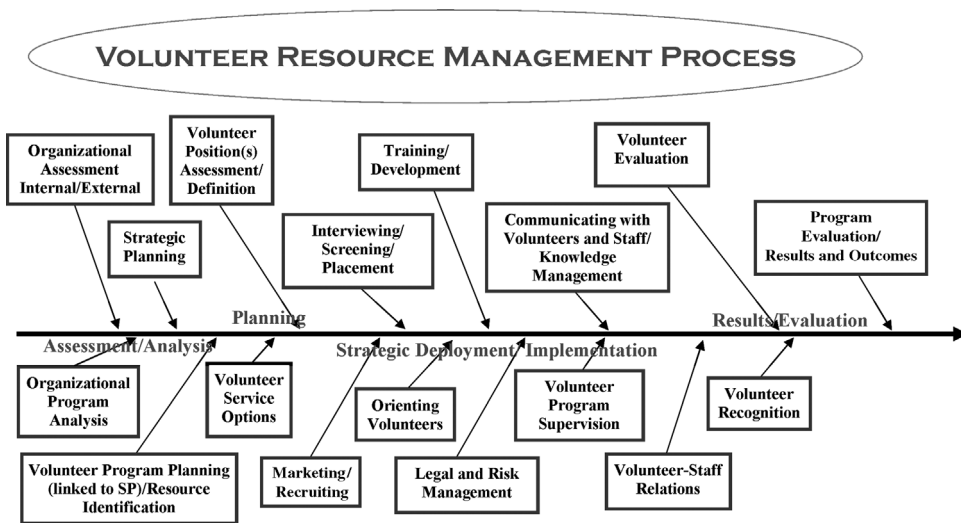


EXHIBIT I.1 Volunteer Resource Management Process

effectiveness—measurement and analysis to determine the extent to which the plan was achieving the results intended. Fact-based decisions can then be used to adjust or revise the plan as needed to ensure continued movement in the direction of mission fulfillment. Finally, these data become decisions that are applied as program improvements—that are then plugged into another cycle of assessment and analysis (i.e., continuous process improvement).

As the Ishikawa (“fishbone”) diagram in Exhibit I.1 illustrates, the fundamental management model for NPOs can be seen as including four stages: assessment/analysis, planning, strategic deployment/implementation, and results/evaluation. Safrit and Schmiesing provide additional detail and perspective regarding volunteer resource management business process models in Chapter 1, “Volunteer Models and Management.”

The basic stages and typical sequence of volunteer resource management activity include:

- Volunteer policy making
- Planning and staff analysis
- Options for volunteer service (including episodic, online/virtual, and traditional modes)
- Recruitment, screening, orientation, and training
- Supervision
- Legal and risk management
- Communications
- Volunteer and staff relations
- Program evaluation
- Rewards and recognition (Connors, 2009).

The volunteer resource management business model serves as the structural and content framework for the *Volunteer Management Handbook, Second Edition*.



Chapter topics and contributors were sought for each major business area. Further, chapters were organized, in general and where possible, to follow the flow or sequence of the model, thus suggesting a general management (and instructional) sequence. Contributors were urged to keep praxis as a major objective—the translation and application of theory to practice in NPO management. For those of us who are faced daily with real-world issues and services delivery requirements, this practical knowledge grounded in theory will be highly useful.

## Annotated Volunteer Resource Management Model

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The handbook, its chapters, and their authors are summarized next in the context of the volunteer resource management model around which the book is organized. As both a print and digital publication, the *Volunteer Management Handbook* is able to offer the strongest value for its readers and users by taking the fullest advantage of online access provided by ever-expanding IT capabilities and digital publishing. Digital chapters can be accessed from the Web site ([www.wiley.com/go/volhandbook](http://www.wiley.com/go/volhandbook)). (See “About the Web Site” at the back of this book.)

### **Part I: Volunteer Resource Program Assessment, Analysis, and Planning**

#### **Organizational Assessment/Planning**

##### **Chapter 1: Volunteer Models and Management**

R. Dale Safrit, EdD, and Ryan Schmiesing, PhD

Chapter 1 introduces and defines the concept of volunteer management to establish a foundation of relevant management definitions, business model comparisons, and how they interrelate with the concepts of volunteer and volunteerism. The authors provide an important and fundamental definition of volunteer management as “the systematic and logical process of working with and through volunteers to achieve the organization’s objectives in an ever-changing environment.” Historical models of volunteer management are explained, with attention paid to their major contributions to theory and practice, culminating in an in-depth description of the PEP model of volunteer administration: (personal) *p*reparation, (volunteer) *e*ngagement, and (program) *p*erpetuation. The authors conclude the discussion of volunteer resource management models by identifying and sequencing competencies and management activities, urging that as practices change—as they inevitably will to reflect changes in the operating environment for NPOs—degree and certification programs should incorporate these changes into their curricula to ensure relevancy and high levels of individual preparation for the workforce.

##### **Chapter 2: Volunteer Demographics**

Harriett C. Edwards, EdD, R. Dale Safrit, EdD, and Kimberly Allen, PhD

Chapter 2 explores the concept of volunteer demographics from three perspectives: Volunteer demographics in the United States are described for 2010 (as well as selected demographic trends since 1974); volunteer

demographics are approached from the perspective of human development across the life span, with accompanying critical implications for volunteerism and volunteer management based on specific periods of human development; and volunteer demographics are discussed based on the contemporary theory of generational cohorts, again with accompanying critical implications for volunteerism and volunteer management based on specific generational cohorts.

The authors provide a framework combining both theory and practice that underscores the importance of understanding and considering demographics as the matrix within which “the larger stage on which the theater of volunteerism is enacted.” Further, the authors correlate important demographic considerations with proven management practices to, using their own analogy, establish a beautiful quilt that creates synergy through combining individual blocks.

### **Chapter 3: Preparing the Organization for Volunteers**

Jeffery L. Brudney, PhD

“In their eagerness to reap the benefits of volunteer participation, organizational leadership may overlook the groundwork necessary to create and sustain a viable volunteer program,” Brudney points out in Chapter 3. “Although understandable, this tendency can jeopardize the potential advantages ... increase problem areas.”

Brudney explains why governance leaders are well advised to weigh the costs and benefits of volunteer participation in ways that support the organization’s ability to fulfill its mission and to establish reasonable expectations for these programs. For example, the rationale and goals for the volunteer program should establish the basis for why volunteer involvement matters to the organization—is the fundamental question “Why are we doing this?” Paid staff should be meaningfully involved in helping to design the volunteer resource program, thus ensuring smoother program implementation and more effective operation. Thought should be given to how the volunteer resource program and its participants will be incorporated into the organization structure—for example, housing and management. Leadership positions should be developed that outline responsibilities and provide directions for the new volunteer program. “To the degree that leadership undertakes these activities, the organization should avoid the potential pitfalls and generate the considerable benefits of volunteer involvement,” Brudney concludes.

### **Digital A: Volunteer Management of Governance Volunteers**

Keith Seel, PhD, CVA

The term “governance volunteers” typically refers to members of the NPO’s board of directors. There are an estimated 5 to 7 million governance volunteers serving on boards of directors in North America. These volunteers serve their organizations and their communities based on the requirements of their states or provinces relating to incorporation. Seel explains and outlines the general frameworks that defined the roles and responsibilities of governance volunteers. He also correlates the core competencies of

volunteer resource management with governance domains to identify connections and linkages between the two areas of responsibility. Significantly, he explains how knowledgeable VRMs can use their experience to improve the overall functioning of boards of directors.

Seel makes the case for more effective bridging between the worlds of governance and volunteer resource management in ways that help bring about more positive outcomes for the NPO. Governance volunteers will benefit from the knowledge and skills of a professional VRM, he emphasizes. On matters of policy or risk management, he stresses the importance of consistency and integration across all levels of volunteer engagement. Finally, he emphasizes and explains the reasons behind why human resource assets of the organization—both volunteers and staff—can and should be deployed more effectively to accomplish the organization's mission.

#### **Chapter 4: Shaping an Organizational Culture of Employee and Volunteer Commitment**

Judith A. M. Smith, DM

NPOs successfully recruit volunteers based on such factors as their compelling missions, a charismatic leader, or whether the particular volunteer position represents an ideal match of the skills and services they have to offer. Very soon after new volunteers join the organization, they begin to experience the organization's culture. The invisible hand of organizational culture, as Smith explains, will determine whether new volunteers will internalize the organization's goals and values, whether they will exert their best efforts on behalf of the organization, and whether they will develop a commitment to the organization, its programs, and its mission.

Conversely, the organization's culture can have a negative influence on volunteers and turn them away from the organization and in the direction of other options—ranging from volunteering within the different organization to using their discretionary time in a different way. In short, organizational culture matters a great deal, and its dynamics need to be understood by all of the organization's leaders, perhaps in particular by the VRM. Smith outlines the dynamics and concepts of organizational culture and explains why it is a major challenge to make genuine cultural changes within any organization.

Smith offers a four-dimensional cultural assessment model and analytical tool that incorporates physical, intellectual, emotional, and spiritual components and suggests why these dimensions are useful to better understand an organizational culture.

#### **Digital B: Understanding the Changing Organization as a Primary Context for Volunteering**

Judith A. M. Smith, DM

NPOs, certainly including the volunteer resource programs used in most to provide a substantial part of their human services delivery, are operating in a chaotic world, where rapid change verging on chaos has become the new status quo. As Smith correctly points out, the roles of the individual volunteer and of the VRM are undergoing fundamental change as a reflection of the changes the organization itself must make in order to survive and to fulfill its mission.

Smith summarizes the evolution of organizational structure from the dawn of the industrial age through contemporary times. Having established a basis for comparison, she offers us a glimpse of tomorrow's organizations. She concludes by explaining the perspective to be gained from each of the industrial era theories, including the evolution of bureaucracy "as the crowning achievement of the industrial era." This generation is privileged, she explains, to be offered the challenges inherent in dealing successfully with the reality of a new world of management, one evolving during our lifetime, and reshaping our organizational operations and structure with new ways of obtaining and using information, IT, and information networks. The world is changing, the organizational work is changing, the role of the worker is changing, the worker is changing, and the volunteer workforce is changing as a reflection of the milieu from which they come forward to serve their communities. Smith explains this historical and organizational context in ways that help our VRMs better optimize the value that volunteers can add to our organizations and their contributions to quality of life.

**Digital C: Organizational and Programmatic Benefits from Adversity: Comprehending the Centrality of the Role of Adverse Experiences in and on the NPO and Its Programs**

Elizabeth Power, MEd

Adversity, and how we learn from it and respond to it, is the focus of this thought-provoking and insightful chapter. Power addresses the backdrop of adverse experiences and how they influence individuals, organizations, and programs; how they can manifest themselves in the organizational environment; and how organizations can establish a culture conscious of the span of experience that includes adversity as a factor in its dynamics.

Many NPOs, or programs within them, were launched to turn adverse experiences into positive action. Adversity, as Power points out, has many faces and has the ability, regardless of how resilient an individual, an organization, or community might be, to affect all areas of life. Her discussion of organizational culture change focuses on assessing the culture to determine its current state, defining the desired future state, then identifying and implementing the actions needed to achieve and sustain the envisioned culture. The experience-informed organization is aware and mindful of the presence, power, and impact of favorable as well as adverse experiences on the people with whom it is involved.

Adversity can, and often does, affect volunteer program cycles. The astute VRM understands that volunteer programs should incorporate the reality "that people do the work they do for reasons often related to the cause," and that often includes adverse experiences. Power suggests the importance of incorporating known best practices from other fields—such as that of trauma-informed care—into volunteer programs where appropriate.

Awareness of the role of adversity in affecting the behavior of individuals and organizational culture can and should lead to program strategies and tactics that reduce the stress of working with impacted persons, increase the quality of interactions at all levels, and contribute to overall stakeholder

wellness. Models from the trauma-informed care foster responses based on collaboration, organizational and individual self-care, and practical parallels between the elements common to those models and an organization's stated and operative processes.

## **Operational Assessment and Planning**

### **Chapter 5: Maximizing Volunteer Engagement**

Sarah Jane Rehnborg, PhD, and Meg Moore, MBA

Leaders of organizations engaging volunteers to help deliver human services and thus support the organization's mission should have an expansive conceptualization of volunteering. They need to understand the complex interactions between the needs and goals of the organization (or the cause it serves) and the expectations and concerns of those delivering services "of their own free will"—volunteers.

Rehnborg and Moore offer the Volunteer Involvement Framework (weighing opportunities, challenges, and risks) as a means to better understand contemporary themes in volunteer engagement and to organize the information to assist in job design, recruitment, and decision making. This framework helps guide volunteer managers, executive directors, and board leaders in establishing their volunteer engagement practices, identifying service opportunities, and dealing with staffing and management issues. With the proper information, the framework can serve as a basis to conceptualize a comprehensive, diverse, sustainable, volunteer engagement initiative.

The process of recruiting volunteers begins with the organization's assessment and analysis of the current or projected volunteer program. The analysis must give adequate consideration and forethought to how volunteers fit within and contribute to the organization's larger mission and, further, how the envisioned future state of volunteer engagement aligns with other organizational strategic goals, thus creating a sustainable foundation for ultimate success. The authors outline a highly useful and original template for planning or reassessing your organization's volunteer-engagement strategy.

### **Chapter 6: Assessment, Planning, and Staffing Analysis**

Cheryle N. Yallen, MS, and Barbara K. Wentworth, MS

Assessment, planning, and staffing analysis represent three vital areas within volunteer program management and leadership. Authors Cheryle Yallen and Barbara Wentworth review the many benefits and contributions that an effective volunteer resource management program can make to the organization's mission fulfillment. Developing and sustaining a successful volunteer resources program also presents challenges, ranging from adequate financial resources and building support from the board and staff, to investing insightful planning in the program's definition and deployment. After reviewing major demographic sources of volunteers and typical opportunities for volunteer service, the authors stress the importance of preprogram assessment, alignment with the organization's mission and vision, and consideration of those benefits and challenges inherent in a volunteer program (e.g., required resources).

A strategic job analysis includes the process of identifying the specific tasks to be performed, including the knowledge, skills, abilities, and other (KSAO) characteristics that are required to perform the newly defined position successfully. KSAOs should be prepared and in place for all current and projected volunteer positions and should be highly aligned and correlated with the organization's strategic plan, goals, and objectives.

The authors outline the process of competency modeling that identifies the specific competencies that characterize high-performance and success in any given job. These, too, should be aligned with the organization's strategic objectives. A volunteer position analysis includes competency modeling, position descriptions, and position specifications to ensure its effectiveness and alignment with the organization's strategic objectives. The authors include a strategic position analysis/competency template to assist readers in preparing job descriptions (basically summarizing the analysis) that help ensure greater success in recruiting the most qualified individuals for positions that will clearly advance the organization's mission efforts.

## **Chapter 7: Policy Development for Volunteer Involvement**

Linda L. Graff, BSW, MA

Policies are developed to guide decisions and actions, articulate guiding principles, and identify expectations. Policies define limits and outline responsibilities within an organization, and can be prepared at almost any level and for almost any structural or operational area. Author Linda Graff discusses policies and procedures in the context of volunteer program management as they apply to all voluntary action organizations and all volunteer roles.

Far too many nonprofits operate with few, if any, volunteer resource management policies in place. This is a risky practice at best if we agree that policies are "critical to effective volunteer involvement, quality programming, excellence in service provision, increased productivity, and greater volunteer satisfaction." These are all positive outcomes of good policy development.

If sustained superior organizational performance is insufficient to motivate policy development, potential risk and legal consequences inherent to inadequate policy should compel immediate and sustained attention to this highly important element of volunteer program infrastructure. Further, national trends will surely continue, if not accelerate, in the direction of increased accountability and transparency by voluntary organizations. These trends, combined with ever-higher standards of due diligence, demand greater attention by nonprofits to policies and procedures that guide the effective, efficient, and accountable management of all their programs, including volunteer resource management.

The author defines policies and why they are needed and offers a useful explanation of the policy development process, with particular attention on how to write policies for volunteer programs. Several sections offer concrete strategies to ensure good policies are also understood and followed, and the author concludes with helpful observations on successful introduction of well-written policy. Throughout, the practicality of this chapter is enhanced with the inclusion of dozens of sample policies that illuminate both the art