The New Volunteer Manager: The First 90 Days

22 BIG PICTURE TIPS to rock your volunteer program right from the start

by Tobi Johnson, MA, CVA

VolunteerPro^{SM}

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VolunteerPro is a volunteer management training and networking community designed to save you time and accelerate your skills and impact.

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She authored Chapter 1 of the new anthology *Volunteer Engagement 2.0: Ideas and Insights for Transforming Volunteer Programs in a Changing World*, published by Wiley & Sons last year.

Tobi is also the author of *Tobi's Nonprofit Management Blog*.

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Introduction: Be the Spark!

There is no doubt that volunteer management is a tough job, especially when you're just starting out. For many, the title "Volunteer Coordinator" has been tacked on to a growing list of job responsibilities. It can feel a bit disconcerting.

If you're feeling overwhelmed don't worry. You are not alone. Most coordinators of volunteers get little by way of training and guidance, and they simply don't know where to start. How do I recruit my very first volunteer? Will people really care about our work? Will they really have the time to help? All good questions.

You'll be relieved to know that volunteering is alive and well. According to the most recent data from Corporation for National & Community Service, 62.8 million adults volunteered almost 8.1 billion hours in local and national organizations. In 2010, that service was valued at almost $173 billion! And, volunteerism has been holding steady. The volunteer rate for the US has remained at approximately 26% for the past five years.

With one in four people over age twenty five involved in volunteering, it's clear that community service is a significant national pastime. Given the high interest in volunteerism, the questions for nonprofit programs are simple -- How do we connect with people who share the same passion for our cause? And how do we work in partnership with them to bring about change for the common good?

The questions may be simple, but designing a smart volunteer program takes a little savvy. That's why I wrote this eBook, "The New Volunteer Manager: The First 90 Days." I hope it will help people who are new to the field get started off on the right foot.

There are proven tactics out there that work. There is no need to reinvent the wheel and waste time learning by trial and error. By the same token, the field of volunteer management is constantly evolving. As social scientists and nonprofit practitioners learn more about how humans relate and are motivated, our tactics are being refined. As we learn more about our social space and how it is expanding through the use of technology, our philosophy of engagement is maturing as well.

All across the world, people who work with volunteers are revisiting their entrenched volunteer management strategies and finding new ways to renovate and refresh them.

If you're new to the field of volunteer management, you are arriving at an exciting time! People are as interested as ever in supporting the causes they believe in. As a leader of volunteers for your organization, you will be a catalyst for action. You'll also act as the bridge between people who want to see a change in the world and organizations who have the resources and mandate to make it happen. It is a fantastic opportunity!

If you are a veteran manager of volunteers and have been in the business for awhile, I hope this eBook gives you some inspiration as well. I hope you'll find in it refreshing ways to think about your role and that it gives you helpful answers to the sticky challenges you are experiencing right now.

The book is split into three sections that cover the broad range of activities new volunteer managers should try to undertake during their first few months on the job.
I suggest you take time to develop

your program identity and engage the support of others before enlisting any new volunteer support. In my experience, if you don't take advantage of the time available when you first start, it will be very difficult to build this foundation later on, when your attention will be focused on supporting your active volunteer corps.

This book is by no means a complete list of tasks guaranteed to make your program successful. Rather, I focus on the critical elements that I have found most helpful in my work with volunteers. I hope they'll be equally valuable to you as you embark on this new experience.

You may be skeptical, but believe it -- you can be the spark that ignites a community to band together and create change. Your enthusiasm will be your greatest ally. If you're willing to share it freely, your passion for your good cause will be infectious.

So, good luck, welcome to the team, and we're so glad you are here!

PART ONE: Decide What You Stand For

Tip 1: Understand Your Role

The volunteer manager's role is that of a resourceful matchmaker, one who can wed the passion volunteers have for a cause with an organization that can help them make a difference in their chosen arena. To put it simply -- your job is to facilitate the public's work on behalf of causes. You may have not thought about it this way before. You might have considered volunteer coordination as more of a human resources function, that it was all about finding nice, friendly people to plug into your open volunteer slots. That's part of it, but it's not the whole picture. Your job is to help people answer their highest calling, that of helping others.

The "people filling slots," or widget, approach may have worked in the past, but things have changed. Like the rest of society, volunteers have become much more discerning about what they support and how. Because information is more transparent and easy to come by than ever, today's volunteers take their time to research and find opportunities that will really work for their lifestyle. And, they are pragmatic. They want to be certain that whatever they choose to invest in has a distinct and positive impact that they can see and feel.

Today's volunteers also want the respect and authority afforded paid staff without the hassle, stress, and rigidity that often come with a paying job. Responding to those specific needs requires more give and take than with traditional supervision, making volunteer management, in some respects, even more challenging than supervising paid staff.

"The obvious thing is that 'it takes time!' But less obvious is that volunteer engagement requires managers to really prioritize the needs and perspectives of volunteers in a way that they might not be accustomed to doing. There's a give and take that is much more delicate in volunteer engagement versus, say, employee development. But when you get the program rolling and the kinks worked out, it's amazing what you can accomplish together!"

-- Robert R., San Francisco, CA

There really is an art to leading volunteers. By carefully listening to your their wants and needs, you can perfect your craft and build a successful program all at the same time.

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Volunteer Managers Wear Many Hats

- Marketer
- Human Resource Manager
- Supervisor
- Fundraiser
- Customer Service Guru
- Matchmaker
- Sales Leader
- Data Analyst
- Cheerleader
- Change Agent

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Your Most Important Role: Leader

If you are to be successful, you'll need to collaborate with volunteers, paid staff, and community partners in a leadership role. This means you must own the responsibility and authority of that role, no matter how uncomfortable it makes you at first. You'll also need to nurture your own growth by continuously building your skills and ability to influence others.

Reading this book is a great first step!

Being a leader, though, doesn't mean you have to do it all, nor that you need to make all decisions. If you are also responsible for direct service or other tasks, along with the responsibility of managing volunteers, it will be impossible for you to handle everything yourself. To inspire your team, work hard to nurture an inclusive culture and then step back and allow your volunteers to do what they were recruited and trained to do.

Because the job of engaging high-quality volunteers is such a big one, it makes sense to develop a support network (usually a mix of paid staff and volunteers) to get the work done. This includes not only the work of the program, but also the tasks related to recruiting and supporting volunteers. With a diverse pool of skills and talents, developed by encouraging responsibility at a variety of levels, your program will be stronger. Remember, sticks in a bundle are unbreakable.

For some leaders in the helping professions, it's hard to let go of being directly involved in bringing about a result with a client. It's a challenge to have patience as you

wait for the work of the volunteers to be completed. It's a hassle to have to coach and potentially pick up the pieces when a volunteer doesn't demonstrate the most effective technique or the best follow through. But, think how frustrating it must be for volunteers who are held back from contributing fully to the tasks at hand, for being trusted and recognized as intrinsic parts of the whole. Getting work done through others isn't always easy, but it is a prime directive for managers.

To cultivate ownership across the board, and to build your volunteer talent, take some time out to choose which management style you will favor. I suggest that instead of automatically assuming a top-down, command-and-control model of supervision, build a culture of shared leadership. Allow for inconsistencies and less-than ideal productivity, at least at the beginning.

Recruit the right people for your program, match them with jobs that make the best use of their specific passions, provide the initial training and ongoing support volunteers need, and allow them to grow their talents.

You don't have to do it all, nor should you. Make sure everyone understands that you are invested in a team approach, one that everyone is accountable to. Have faith that you will make a difference in the lives of many people through your work, as actualized by the power of the volunteers you lead and support.

"Every volunteer does something well naturally. When you ask a volunteer to take on a task or responsibility, always remember to tell them why you asked them. 'You are so good at making others feel welcome and appreciated. We could use your smiling face at the registration table for the conference. Could you do that?'"

-- Beth U., Nashville, TN

Tip 2: Describe What Success Looks Like

Once you've taken time to fully flush out your role, it's time to imagine your team's future. If you don't know where your program is headed, chances are you'll never get there. So, invest some time developing your vision. What will success look like six months from now, a year from now, three years from now? What will your program have achieved in terms of its impact on the community?

What about your volunteers? How many volunteers will be contributing their time? What will they be doing, specifically?   What decisions will they make? What leadership roles will they take on?

At this point, you should seek absolute clarity of purpose. That doesn't preclude you from changing your mind later, but if you are muddy about where you're headed now, it'll make it very difficult to take the bold steps necessary to realize your vision and even more challenging explain your roadmap to potential supporters.

To help get clarity, create identity statements that succinctly describe your program's unique vision and purpose. If you need inspiration, search the internet for examples. Also, browse the websites of other nonprofits you admire. Is their identity clearly described in their materials? Do they have any good ideas you can adapt?

If you already have some volunteers on board, whether they be veteran or newbie, involve them in the process of developing responses to these statements. If these ideas have already been developed, revisit them. Dust them off and decide whether

Identity Statements

- **Program Mission** -- Our job is to...(i.e., who we are, what we do, how we do it, why)

- **Vision** -- Where we are headed...

- **Values** -- What we believe in...

- **Impact Statement** -- The difference we make...

they need updating or tweaking to be more in line with your current reality.

As you develop these concepts, try to be as specific as possible. Don't rely on generalities to express what you really mean. "Our job is to make the world a better place" doesn't really tell anyone anything.   "Our job is to provide information to help people make better health care coverage decisions, so they can save money and get better access to care" is pretty clear. It clearly communicates to potential supporters what you are trying to do and how you are trying to do it.

The more specific you can be the better. This identity is your positive edge. In business they call it a value proposition. Others call it a brand. Regardless of what you choose to name it, it is your promise to the community. And, it is the way supporters will decide whether your program is a good match for their skills, talents, and aspirations.

Your positive edge is also what makes you special and different than other organizations or programs. You may be wondering, why bother spending the time to develop or refine these statements? Our

organization or program already has a mission statement.

Aside from giving you focus, having a clear identity will help you describe who you are to the outside world. You'll use this information again and again -- to communicate with potential community partners and to recruit new volunteers, even to people inside your organization. You'll also continue to reflect back on it as time goes on -- to motivate your team, to reconnect with people who've lost their way, to focus your planning efforts.

Unless your current mission statement is absolutely compelling and clearly describes all of the information in the identity statements above, it will be of minimal help to you. Most mission statements are boring and hard to decipher from the outside looking in. Volunteers don't want to hear a bunch of internally-focused "501c3 speak" made up of jargon they don't understand.

Rather, they are ready to be inspired by the energy and spirit of who you are, where you're headed, and what you can do in the external world. So, invest the time to vision your future and get it down on paper.

If your organization requires a bureaucratic approval process that may hinder you, call your identity statements "talking points," and then keep moving ahead. It'll make them less threatening to the higher ups who will be less likely to delay your progress.

"A manager of volunteers should be very open in providing answers to questions (such as 'why?') ... whereas managers in private employment may expect employees to 'jump' just because they said 'jump' (without employee knowing reasons why).

Volunteers are giving of their time (and giving up the money they could possibly earn during that time if employed !)."

-- Roger M., Oak Ridge, TN

Tip 3: Make Sure the Investment Your Volunteers Make Pays Dividends

Volunteers are making a deep, personal choice when they agree to join your team. All the more reason to be clear about what you have to offer and to then deliver a high-quality volunteering experience. Word will get around, and quickly.

The plethora of information that is categorized, sorted, judged, commented upon, and publicly shared in today's world is astonishing. It is almost unheard of to buy anything without checking to see what others think. In the past, we relied on close friends and family for these reassurances. Today, because of the internet's capabilities, the breadth of this social proof is infinite and so powerful that the opinions of complete strangers will influence our purchasing decisions. Social proof influences which organizations and causes we choose to support, too.

Volunteers, rather than assessing whether a product or service has value in a commercial sense, will listen and watch closely to see whether the organization has the capacity to make a difference in an area they care about. They are not only looking for a specific connection between their passion and your mission, they also want to be sure that you can actually help them get the job done.

Volunteering is an investment, and volunteers seek to spend their time wisely. They trade in the time they would otherwise spend with family, earning money, relaxing, or socializing in return for the chance to change the world for the better. When they trade in their time and commit to volunteering, they are taking a chance that their experience will fulfill a personal need and often a higher calling. If this need is not met, they will look for other ways to fulfill it within your organization.

"I come from the volunteer side, and my one point would be 'be organized'. As a volunteer you want your time spent doing something productive.

I volunteer a couple times a year at the local food bank. We get signed in and are working in 10 minutes. At the end of the day the supervisor tallies up all the pounds of food we've bagged, boxed, and tagged. What a great sense of accomplishment!"

-- Kellie D., Seattle, WA

And, if it continues to be unmet, they will look elsewhere.

Volunteers also invest their talent. They bring existing skills and knowledge to the table, and they expect that this raw material will be put to good use. In some cases, volunteers are clear about which talents they want to bring to bear, and which they do not. Some want to put their professional knowledge to work, others want to use a social skill they have, still others want to learn new things through volunteering. What's important is that there is a match between what the volunteer is asked to do and what they are comfortable with. If a volunteer is not given meaningful assignments, they will become dissatisfied and move on.

Finally, volunteers invest their social capital. They invest a significant amount of good will in a shared endeavor with your organization, with the expectation that the experience will bear fruit for both sides. When there are perceived inequities in this relationship, your volunteers and your program will suffer.

Volunteers who recruit other volunteers or ask others to support your organization are spending the social capital they have build through relationships with those they have approached. If the investment doesn't pay off, their satisfaction with the process will wane.

If the investment of time, talent, and social capital pays off, your volunteers will have an experience that feels good and sits right with them. Their volunteer job is likely to feel more than just a worthwhile endeavor. It's common to hear volunteers who are highly satisfied assert that their volunteer job has given them more back than they ever put in. And, they're usually amazed by the fact. When you hear these sentiments expressed by your volunteers, you know you are in tune with their needs and on the right track.

To Do List

- ☑ Choose your leadership style
- ☑ Develop program identity statements
- ☑ Get current volunteers involved in program planning

# Tip 4: Manage the Three Life Domains Volunteers Travel Within

Your role as volunteer manager takes place entirely as part of your work life. For volunteers, however, this isn't the case. They may volunteer as part of their work day, or they may donate their time as part of their private life. For most people, volunteering falls somewhere in between work and play. Volunteering requires more flexibility than a paying job and at the same time more structure and accountability than at home.

The division between private life and work life are semi-permeable, and are traversed almost unconsciously by volunteers. To help guide them through the maze, be mindful of your volunteers' individual perspectives. Remember that while you manage volunteers, you are a person entirely engulfed in the trials and tribulations of your work life.

Learn to switch gears and re-calibrate your communications and expectations to be more in tune with the language and culture of the volunteers who consider volunteering a leisure activity and thus part of their private life.

Help volunteers who are struggling with the transition from their private lives to the necessary boundaries required by their volunteer job.

Managing volunteer expectations and ensuring compliance with your program guidelines will be a critical element to your success. To help volunteers understand your guidelines for expected professional conduct, give them a clear roadmap and for "how we do things around here." This can be reinforced in trainings, volunteer position descriptions, and volunteer handbooks. At the same time, recognize those volunteers who are confused and offer immediate and compassionate coaching around any issues that arise.

Private Life	Volunteer Life	Work Life
	↔	
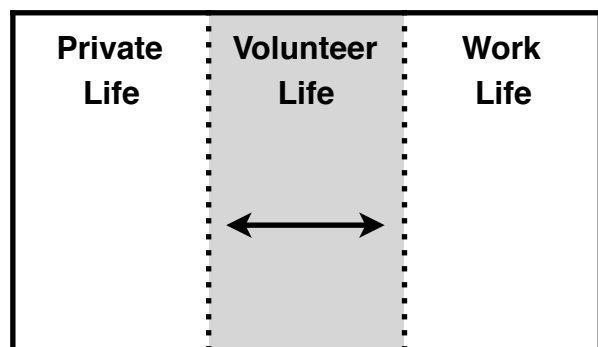
PART TWO: Build Networks of Support

Tip 5: Tap Into the Power of Networks and Let Go

As I mentioned earlier, the work of managing volunteers and delivering volunteer-based services is a big job, and one you can't do alone. That said, one of your prime responsibilities will be to cultivate relationships that will help your team work better and be more productive.

In the rush to check tasks off of a growing "To Do" list, nonprofit managers often resort to owning each and every task that comes their way, asserting that "it's just easier and faster to do it myself." That may be true in the short term, but it's an unsustainable solution. The more you take on, the more work will come your way, and the less support you'll get from others. It's a vicious cycle, so try to avoid it.

One way managers can release this pressure, is by shifting focus from being the center of all information and action to helping teams connect with a number of other "go to" people. Instead of solving all their team's problems, savvy managers help their team (both paid and volunteer) develop the capacity to solve them on their own or through a network of resources.

In order to develop these networks, look for ways to capitalize on what others are already doing, or for whom the task would be easy to accomplish. Distributing the workload throughout a broad network can reduce the pressure on one individual, but also has a higher purpose. It builds relationships that can bring value to your team in ways never imagined.

If you have suffered from an oversized workload in the past or have struggled with give authority or responsibility to others, now is a great time to change your paradigm. It's time to learn to delegate and let go.

The good news is that that are many user-friendly collaborative tools that make this job easier. Encourage your team to make use of the web-based tools to post and share ideas, information, and resources.

To the extent possible, make open access so that everyone on your team can upload, download, and comment on materials and ideas (try using a wiki; www.wikispaces.com has a free, easy-to-use software to do it). That way you'll encourage the free flow of ideas though a network, versus a top-down approach with you as the ever-present bottleneck.

Tip 6: Develop Your Internal Network First

In addition to asking that your team, regardless of their job title, act as resources for one another, look inside your organization for other people who have expertise you could use. Nonprofit managers often search outside for community partners that can help. This is important to be sure, but it's also a missed opportunity if they neglect the value of the tremendous expertise that's right there at home.

Aside from your current staff and volunteers, people in your own organization can be of great help to you. They can provide advice, support, technical assistance, and free word-of-mouth advertising that you just can't buy. On the flip side, if you have a rocky or nonexistent relationship with other work units, they can tarnish your reputation and credibility by incorrectly framing who you are and what you do. So, take the time to build the bridges and educate everyone about your program's good works.

Also, make sure that anyone who will be working with your volunteers has the training they need to be successful. Staff will need to be briefed about your program's policies and procedures. Although they may already work with paid staff, volunteer supervision is different.

They'll appreciate and benefit from the time you invest offering guidance on how to work effectively with volunteer team members. And, they'll have the added "feel good" benefit of knowing their support has contributed to an expansion of your entire organization's capacity through volunteers.

Partner Meeting Agenda

Here's a suggested agenda for your meetings with internal partners.

- **History and operations of their department**
- **Their current priorities**
- **What they need from you** (support, compliance with processes, preferred communication styles, process for resolving conflicts, etc.)
- **Description and priorities for your program**
- **Ideas about how they can help you**
- **Next steps**

Internal Allies That Matter

Here are only a few of the ways these allies may be helpful to you.

- **Fund Development Office** (processing in-kind donations, tracking volunteer hours for grant applications and annual reports, coordination of fundraising and volunteer asks, volunteer recruitment info at fundraising events, training on how to cultivate in-kind support, assistance with grant applications, etc.)

- **Communications Team** (communications style guide, electronic copies of logos, boilerplate text, media relations policy and process, opportunities for co-marketing and outreach, marketing training for volunteers, etc.)

- **Human Resources** (employee policies and procedures, volunteer orientations, risk management advice, supervision tips, legal advice, volunteer recognition ideas, etc.)

- **IT Staff** (help posting success stories, analytics of online recruitment postings, basic technology training for volunteers, web page search engine optimization, social media strategy, suggestions for free or low-cost software solutions, volunteer relationship management database development, etc.)

- **Key Executive Leadership: Board, Executive Director, Program Directors** (info on critical strategic goals of the organization, volunteer appreciation, support for consulting contracts, pro-bono professional services, access to staff and volunteer in-service training, etc.)

- **Facilities/Janitorial Staff** (help with event set up, after hours building access, equipment check out and repair, etc.)

- **Co-Located Programs** (shared reception coverage and office supplies, coordinated outreach, coordinated service delivery, client cross-referrals, etc.)

- **Other Volunteer Programs Inside Your Organization** (cross referral of volunteer applicants, resource sharing, co-branded recruitment, shared orientations, shared recognition events, in-service training swaps, etc.)

Meetings with Future Allies

Once, you've identified who you want to contact at your agency, then set up your meetings. When setting meetings with executive leadership, make sure you've used the appropriate chain of command. If your boss wants to tag along, invite them.

Start your conversation out by asking questions and listening. Be sure to not only present your needs, but also listen for how your team can help them directly, or at least make their life easier.

Give them a simple, one-page handout that describes your program and what you've accomplished so far. This will undoubtedly provide information they didn't have before and will ensure they have positive talking points about you going forward. Do not be tempted to give them a packet of information. They won't have time to read it, and it will cloud the water. Rather, offer to send any additional information after the meeting, if they request it. This will also give you another opportunity to touch base and continue to cultivate the relationship.

Don't assume they know everything about you, even if your office is just down the hall. It's amazing how little internal work units know about each other, and how easily the grapevine spreads misinformation when it goes unchecked.

And, don't be shy about setting up these meetings. You never know, helping you may be just the inspirational outlet your colleague needs, either as a brief respite from more boring tasks or an opportunity to make a difference in a way that's new and refreshing. Even if they can't help right now, they'll be flattered you asked and will be more likely to agree the next time around.

Tip 7: Solidify the Relationship and "Tend the Garden"

Unfortunately, one meeting does not a partnership make. So, it's important to continue to continuously cultivate your "garden of mutual benefit." Be sure to follow up your meeting with a handwritten thank you note (not an email) and mention a few brief ideas about what you see as the mutual benefits of working together. If you promised to email them any additional information, send it within twenty-four hours.

As you move forward together, continue to communicate about the program successes you have encountered, especially those that were due to their help. Check in from time to time to see if, in their mind, you have followed through on all of the commitments you've made to them. If you come across bumps in the road, try to resolve things quickly before they have a chance to fester.

Internal partnerships can be as even more powerful that those you develop on the outside. Your internal allies have a vested and ongoing interest in your organization's success, so they are more likely to stick with it. And, if you experience success, your leadership story will spread quickly throughout the organization, thus inspiring others to collaborate. This will make both of you look great.

Tip 8: Develop Your Personal Network

You can be pretty good on your own, but even better with the help of allies within your organization. You can be even more effective with a carefully-selected personal network of people of influence that you can lean on when needed.

Your personal network may have nothing to do with volunteerism, or nonprofit organizations for that matter. Their job is to offer diverse and unique perspectives, provide a safe haven for support, and to help you see your blind spots. The people you ask to join your personal network should be wise, discreet, and compassionate.

Not sure where to get started? Nowadays it's easier than ever to connect with possible mentors. Professional networking sites, such as Linked In (www.linkedin.com) offer the opportunity to check credentials and point of view, connect in a non-threatening way, and share

information and advice across a broad range of interest groups. You can start to generate ideas and support right away with one quick post.

Develop your network organically over time. There is no rush. As you come into contact with new people be on the lookout for those who fit your needs and then approach them. Let them know that you admire their work and you'd like to have permission to contact them from time to time to ask for advice and input. Keep your expectations low at first, and then build from there.

Who Should You Include?

The personalities and experience of the people you decide to approach are more important than whether they fit into neat categories. Quality is better than quantity. Below are a few people you might want to include.

- **Your Boss** (if effective, inspirational, and trustworthy)
- **A Mentor** (preferably outside your organization)
- **Key Gatekeepers** (people who can help you gain access to other people and information; any with whom you've had an affinity and are trustworthy)
- **Subject Matter Experts** (in areas where you are weak i.e. marketing, technology, supervision, etc.)
- **Your Knowledge Network** (LinkedIn, DOVIA, AFP, ARNOVA, Volunteer Match, state/national professional associations, etc.)
- **Other Inspiring People** (those who have good ideas, even outside your field, have struggled and overcome the odds, or who are optimistic and solution focused)

"Volunteers are only as successful as the infrastructure they can be a part of and contribute to. If you cannot carve out a concrete role for them, manage their time, protect them from unknowingly engaging in scope creep because they may not understand the strategic vision (so it is important to convey this clearly and not over promise), and ensure that they do not get overextended by instituting all of the above, then you will experience high turnover and expend a tremendous amount of time and energy running in place.

Ultimately, hosting volunteers is not free, there are opportunity costs all along the way, but with proper infrastructure, the social return on investment is quantifiable and can contribute significantly to overall organizational value, not to mention create a wonderful civic-minded warm and fuzzy factor."

-- Heather B., Brooklyn, NY

Tip 9: Develop External Partnerships that Can Support Your Program

Organizations outside your agency will also be a critical component of your success. Partnerships can be developed with a wide array of entities, such as other non-profits, government agencies, educational institutions, and private industry to name a few. Quality collaborations can help you get the job done more effectively, bring more resources to the table, and lighten the load for your team.

But, don't stick to only the tried and true. Non-traditional partnerships can generate more excitement and motivation among staff and volunteers. They can also be a morale boost for your team because it means that people respect your program enough to collaborate with you.

When developing alliances, relationships matter. Start by including people with whom your network already has a connection. Ask those with connections to make an introduction and attend the initial meeting with you. It will lend you credibility, which will give you a platform from which to build.

Also, see if there are existing partnerships that model what you are trying to accomplish. Are there

Ideas for External Partners

Here are a few of the more common partnerships and ways they can help:

- **Local Volunteer Center** (to raise awareness about your volunteer openings and to cross-refer applicants)
- **Local Businesses** (with Corporate Social Responsibility (CSR) programs to arrange for employee volunteers, to solicit in-kind donations, to sponsor recognition events)
- **Other Local Nonprofits** (to share space or resources and cross refer volunteers)
- **Local Government** (to support events, help raise awareness, endorse your service, etc.)
- **Public Services (libraries, police department, fire department, schools, etc.)** (provide event space, access to computer labs, event

similar partnerships at the local, state, national levels? Can they provide a blueprint you can emulate? Can they lend some vocal support?

Each partnership you forge should include a written partnership agreement. It's a great way to ground your discussion as you negotiate the various aspects of your collaboration. And, partnership agreements help ensure that even if the staff who developed the partnership leave the organization or move to another job, the responsibility for maintaining the relationship can be transferred easily to another staff member.   The existence of a written partnership agreement is also a research-based "factor of success" for nonprofit collaborations.

Some people call them Memorandums of Understanding (MOUs) or Memorandums of Agreement (MOAs). Whatever you choose to call your partnership agreement, your document doesn't need to be overly bureaucratic. Use plain language, and keep them as simple and to the point as possible.

How to Get Started with Partnership Development

- **Do your homework.** Identify the specific needs your program has that cannot be met completely in house (i.e., connections to people who may be interested in volunteering), and then look for partners that have similar mission and values.
- **Then, dig deeper.** Does the organization have the have the capacity to be a good partner? Do they already have partnerships in place? What is the organization's philosophy of collaboration?
- **Look at how their existing partnerships are supported**. Do they always involved grant or contract agreements, or do you think they might be interested in sharing in-kind resources?
- **Look at other successful partnerships for Inspiration.** Do they have ideas and expertise to share?
- **Ask for help.** Ask your board of directors, advisory groups, staff, and volunteers who they know at organizations that interest you. Ask them to help you identify potential partners you may not be aware of.
- **Set up exploratory meetings with potential partners.** Discuss the potential for collaboration and ask questions that evaluate whether they are a good match for your organization. You may decide they aren't, which is OK.
- **Negotiate agreements with partners.**   Document why the collaboration is important, the key outcomes expected, the key players and their roles, primary contact people, guidelines for decision-making and conflict resolution, and how the partnership should be dissolved if need be and documents these in your agreement.
- **Share with your team and the world.** Help everyone understand what the partnership is about and how they are expected to support it.

Tip 10: Build Community by Sharing Valuable Information

In addition to building partnerships in the here and now, you should also cultivate a pipeline of supporters to help you in the future. This network can be built slowly and steadily by providing valuable and interesting free information through social media and email. If your content is helpful and authentic, people will take notice. And as you continue to communicate, you'll build longstanding relationships with them.

The content, or information, you create will depend on the audiences you are trying to reach. For an organization that serves cancer survivors, supporters may be interested in hearing about new treatments or wellness strategies. For an arts organization, supporters might want to know about new artists or exhibitions that are occurring around town. If your organization deals with a sobering topic, find ways to include humorous and inspiring, as well as serious, information.

Be sure to share plenty of personal stories as well. Research shows that people connect through emotions rather than data. They are more compelled to respond, moreover, to the story of one person in need than the story of thousands. So help your supporters deepen their engagement by sharing emotionally-provocative stories about individuals whose lives have been changed by your work. Keep your stories about people, not your organization, and how their lives have become better.

Choose a few platforms where you'll share your stories and content on a regular basis. Start small and then build from there. This is a great job for some teach savvy volunteers. Or, actively pursue qualified, pro-bono professionals to help (try www.sparked.com to find tech pros who want to help nonprofits for free).

Where you choose to post is up to you, but be consistent. When choosing which you will use, check with your communications department. There may be channels or media where your organization already has a presence, or you may need to set them up yourself.

program's reception area, so that people can opt in for more information. But, don't spam. Send information only to people who have given you express permission to contact them and give everyone the ability to unsubscribe at any time they choose.

At the same time, plan to grow your mailing list, comprised not only of people who actively support you but also those who just want to be "kept in the loop." Develop a system to capture the contact information of anyone who might be interested in receiving your information on a regular basis. This might be through an email subscription to your email newsletter or by asking them to enter their information online to download a document you've posted.

"Now that I'm coordinating volunteer events it is my sole responsibility to ensure that an action plan for each unique event is in place and the tools are lined up and show up on time. Nothing could be worse than getting a group of volunteers excited about an event and then the tools not be in place to complete the task. My advice would be to always plan ahead...Additionally that the coordinator or manager in charge be at the event or location prior to the volunteers showing up, so that if something is not just right, measures can be taken quickly to adjust for any situation. And, always keep a positive attitude!"

-- Robert W., West Palm Beach, FL

To add to your list, have sign-in sheets ready at all events and in your

To Do List

☑ Set up a wiki or other online system to share ideas and documents with your team
☑ Make a list of potential internal allies and contact them
☑ Orient staff who will be working with volunteers
☑ Set up a system to regularly share content with the community
☑ Create a partnership agreement template
☑ Draft a partnership development plan and get input
☑ Set up a system to share content with supporters
☑ Begin a story bank

PART THREE: Activate Volunteers

Tip 11: Shape Realistic Expectations

Paperwork doesn't drive programs, people do. So, it's a mistake to focus solely on forms, paperwork, policies, and procedures in lieu of developing a deeper understanding of the human connections that happen between volunteers and your organization. So, let's start there and get to the paperwork a little later.

There's magic and alchemy in a successful volunteer-organization relationship -- a perfect marriage of needs, wants, and desires -- and the only way to to find your perfect match is to be completely open and clear about what your organization does and what is required of volunteers, right from the start.

Any and all communication with potential volunteers is an opportunity to establish realistic expectations, to ensure that disappointment doesn't follow.   Be clear about what kind of

services and value you can offer the community, but don't sugar coat things. Volunteers want to see a clear connection between the community's needs and your organization's chosen solution.

They also understand there are limitations to your capacity. Don't be afraid to share that there are challenges to getting the work done, but do this judiciously. Volunteers deserve a fair and accurate picture of your program, but don't leave them demoralized and less than hopeful about the prospect of meaningful change, even if it is focused transformation.

Tip 12: Engage Both Hearts and Minds

Action leads to engagement. To illustrate this point, volunteers are ten times more likely to become donors than non-volunteers. Because they are already in action, they are willing to take on the additional step of making a financial contribution.

Likewise, small acts on behalf of the overall cause can lead a supporter to make a deeper commitment to volunteering. So, make sure you give people the opportunity to get engaged in a variety of ways beyond just volunteering. These small steps may very well be the first in a much longer journey together.

Also, when thinking about volunteer recruitment, look upstream. Who are the people who are predisposed to support your cause, but haven't yet? Can you engage them in some small way before you ask them to make a longer-term commitment. This could include a day of volunteering but could also involve doing something else online, like voting on an idea, giving feedback, sharing your information with friends, etc.

Think about the baby steps a supporter could take before they invested a huge amount of time and effort and offer those opportunities.

Once volunteers have joined your ranks, continue to encourage them to move up the "ladder of engagement." Give them something to do right away, even if they are still in training. Also, recognize that not all people are committed to the same extent, at the same time; nor are people equally committed to the same degree throughout their volunteer experience.

Respect their current circumstances and encourage volunteers to contribute in the way that makes sense for them. This means you have to listen carefully. Push too hard and you risk alienating your volunteers. Don't offer enough opportunity for participation and growth, and you risk frustrating or insulting them.

Tip 13: Create Your "Volunteer Bill of Rights"

When supporters join your team they have the right to nothing less than a wonderful experience. After all, they are contributing their time and energy for free.   I've listed some basic rights that should be afforded volunteers. You may want to add to these and change them, but these are the minimum.

Once you have your own "Volunteer Bill of Rights" crafted, post it and share it with your current and future volunteers. Don't forget to give all staff a copy, too.

Volunteers Have a Right to...

- Be part of a team
- Competent management (who knows what to do and how to do it, and is true to their word)
- Resources (computer, office equipment, space, supplies, access to break room, etc.)
- Direct supervision and a place to go to get questions answered quickly
- Ongoing support
- Not be kept in the dark about the organization's vision, goals, and expectations
- An inclusive culture that does not discriminate
- Say no to projects and tasks that make them uncomfortable (discriminatory practices notwithstanding)
- Be recognized for their work
- Understand who has decision-making authority in what situations

Tip 14: Get Your Process and Paperwork in Order

As I mentioned earlier, paperwork doesn't drive programs, people do. That doesn't mean that your business processes shouldn't be ignored, however. Your policies and procedures for working with volunteers will help your organization manage its risk and build trust with volunteers. If done correctly, they can also ensure compliance and strengthen teamwork and increase morale.

But, before you start developing policies and procedures from scratch (or improving what's already in place), do some preparatory legwork. Talk with your human resources department or executive management to better understand your organization's existing staff and volunteer requirements. They may also have documents you can use and tweak to fit your program.

You'll also want learn more about the agency's philosophy on using volunteers. If the key decision-makers in your organization don't view volunteers as valuable assets,

you know you have work to do to convince them otherwise!

Also, ask your human resources department what your organization's liability or umbrella insurance covers in terms of volunteers. Then

study your state's "good samaritan laws" and the federal Volunteer Protection Act (http://www.doi.ne.gov/shiip/volunteer/pl_105.19.pdf), so that you are clear about how volunteers are protected against potential lawsuits while the are engaged in service.

Be clear with volunteers about when they are not protected (i.e, when working outside the program's scope of service), so they understand any possible liability and how to protect themselves from it.

"I think that often people get so overwhelmed trying to create or follow a system they forget that it's all about the people. Make a connection; find common interests; let them know that you care about them; ask them to share what their greatest gifts and skills are; then figure out how your organization can embrace them as loyal contributors and advocates for your mission. This goes for staff who will be supervising volunteers as well as volunteers themselves."

-- Anne S., Portland, ME

Tip 15: Develop the Documents You Need

Developing your documents need not be overwhelming. Samples and best practices about how to create volunteer program documents can be found through a simple search online (try www.volunteermatch.org or www.ideaencore.com). Remember, you do not need to develop these on your own. Ask your current volunteers to help.

To get you started, I've included an exhaustive checklist of documents you may need. It may seem like a lot of paperwork, but remember that you are developing a system for coordinating people, in some ways similar to managing paid employees. Volunteers will appreciate the fact that you have a well-organized system in place.

Try to keep the language in your documents simple, friendly, and straightforward. Avoid jargon and acronyms. Also, since volunteer management involves supervising people, your organization's attorney or human resources staff should do a legal review of any documents you develop.

Once you have developed what you need, try to post all volunteer application materials online in a public space. Applicants need to be able access the information at any time day or night, without waiting for a call back or for your office to open. Make sure there is a direct link from your organization's home page and that you provide names and direct contact information for each staff member. Adding a photo next to each person is even better -- people are more motivated to contact a real human being.

Finally, post materials for current volunteers in a password protected part of your website so they can access information when it is convenient to them.

New Rules Meeting Agenda

Use this simple agenda format when making big changes.

- Thank you for contributing your time and energy to our cause
- Where we're headed and what's changing
- Why we're going that direction (here's the risk if we don't change)
- How you can participate
- What's expected of you
- What do you need from us? (resources, time, attention, recognition, flexibility, etc.)

Volunteer Program Document Checklist

☐ **Volunteer Manager Job Description** (updated)

☐ **Business Cards** (for you and a generic one for volunteers)

☐ **Organization and Program Logos** (high resolution electronic files, if any)

☐ **Funding Acknowledgements and Logos** (high resolution electronic files, if required by those who fund you)

☐ **Organization Mission Statement** (if it exists)

☐ **Program Identity Statements** (see Part One of this eBook)

☐ **Volunteer Position Descriptions** (and be flexible enough to create new ones, based on an volunteer's interest)

☐ **Staffing Plan and Org Chart** (with both paid and unpaid positions included)

☐ **Volunteer Application Fact Sheet** (steps for the application process)

☐ **Volunteer Application** (with criminal background check and personal references releases)

☐ **Volunteer Screening Interview Questions**

☐ **Volunteer Recruitment Plan**

☐ **Marketing Materials** (post cards, radio public service announcement scripts, fliers, etc.)

☐ **Volunteer Recruitment Postings** (both online and paper-based)

☐ **Success Stories of Clients and Volunteers** (videos, written, slide shows, audio)

☐ **Volunteer Agreement** (with confidentiality and nondisclosure agreement)

☐ **Volunteer Manual and Acknowledgement Form** (program policies and procedures, not how to perform the work)

☐ **Training Fact Sheet & Course Schedule** (and training plan, if complex)

☐ **Orientation and Training Materials** (how to perform the work)

☐ **Training Certification Test** (if a high level of competency is required)

☐ **Volunteer ID Badges** (if applicable)

☐ **Volunteer Time Sheets** (or online database so volunteer can log their time)

☐ **Volunteer Communication and Recognition Plan**

☐ **Volunteer Feedback Forms** (or satisfaction survey)

☐ **Volunteer Exit Interview Questions**

☐ **Partnership Agreement Template** (to use as a starting point in negotiations)

Tip 16: Set up a Program Tracking System

It's important to set up a system for evaluating how your program is doing right from the start. You may already have performance goals in place related to the services you provide the community, but you'll also want to evaluate your volunteer engagement on an ongoing basis.

Before you start recruiting volunteers, establish some key metrics, or goals, and a system of collecting and reporting them. Think of your metrics as vital statistics that will help you keep tabs on the health of your volunteer program. They'll also help you assess the impacts, both positive and negative, resulting from any changes you make in how you manage volunteers. Equally important, they will be powerful tools to communicate the value of your program to stakeholders.

Your system doesn't have to be complicated. Pick simple, modest goals, and try to make technology work for you. If you have current volunteers who are tech savvy, ask them to help you set up a simple

database that can both track and generate easy-to-read reports.

This quantitative data is important, but don't forget to document the qualitative side of things, too. Be sure to save and archive any materials you create. Maintain a file of photos and stories of your volunteer activities and any "thank you" notes from clients. That way, you'll also have materials to contribute to your agency's annual report and will be ready for your grant reports as well.

Some volunteer managers keep program scrapbooks that volunteers can page through and that can be shared with program supporters. You can set up your own free photo and video sharing accounts online (try www.flickr.com and www.youtube.com), so that volunteers can show their friends and family what they've been up to. Be sure to get permission from those pictured before they are posted

Not everyone understands the true value of volunteers. By tracking and communicating key metrics you, will not only be able to improve your program over time, you'll be able to demonstrate over and over again how you are creating value at your organization. Communicate your successes with decision-makers regularly, so that when you need more resources to get the job done, they'll be more likely to give them to you.

Volunteer Outcome Metrics

- **Volunteer Recruitment Rate** -- This rate is the number of people who complete the application process, participate in any required training, and are placed in an assignment. You may also want to break these down into steps -- i.e, track how many people contact you, how many and finish the application process, etc. This will help you better understand how many people you need to reach initially to have the volunteers you need in the end.

- **Volunteer Training Completion Rate** -- This tracks how many people successfully finished your training. If your training is extensive, or there are high drop out rates, you may want to revisit your training program and scheduling to be sure it is engaging and meets volunteer needs.

- **Volunteer Retention Rate** -- This is the total number of volunteers who stay at least one year from the time they were placed in a position. If your volunteer positions are primarily short-term or one-time events, this metric may not make sense for you. As an alternative, you could also count how many volunteer completed the projects they were assigned.

- **Volunteer Satisfaction** -- Satisfaction surveys will help you measure the quality of the relationship between your organization and its volunteers. They allow you to gather anonymous comments in an unthreatening way. There are online tools that can help (try www.surveymonkey.com). Be sure not to overwhelm volunteers with too many questions. If you only ask one question, ask this: "Would you recommend this volunteer experience to others?" You might also ask: "What should we stop doing, keep doing, and start doing?" These are the most telling satisfaction survey questions to ask.

- **Volunteer Hours (monthly, quarterly, annually)** -- As opposed to the total number of volunteers, your volunteer hours are the lynchpin of your program. They will help you understand your current capacity and recruitment needs. Volunteer hours fluctuate with the season. But over time, you'll get to see the patterns in your program. As you make improvements to various aspects of your operations, tracking your total volunteer hours will help you better understand if those changes are hurting or helping your team's productivity.

- **Annual Value of Volunteer Time** -- The national average value of an hour of volunteer time in 2011 was $21.36. By multiplying your total number of volunteer hours by the hourly value for your state (see http://independentsector.org/volunteer_time for state-specific data), you can determine a dollar figure for the work, if it were performed by paid staff. It's pretty impressive and helps concretely demonstrate the return on investment.

- **In-kind Resources Generated by Volunteers** -- In-kind resources are items that are donated other than cash. Their value is generally estimated. For example, if a volunteer donated their business conference room for a training, you would count the estimated cost to rent that room elsewhere. Or, if a local motivational speaker donated their time to deliver the keynote at your annual volunteer recognition luncheon, you would count the cost of their fees. In-kind resources are more of a hassle to track than cash donations, but they are still important. They can be used as "matching funds" in some grant applications, and they demonstrate that the local community supports what you are doing. Set up a system to track them. If volunteers are generating these resources, you'll be able to communicate even more volunteer value.

- **Money Saved Program, Clients, Community** -- If your volunteers are serving clients directly, it's likely they are helping them overcome some kind of challenge. These challenges usually have some cost associated with them. If you can find a way to determine how much was saved as a result of volunteer assistance, you'll be able to demonstrate the actual affect your program has on the community. It's the single most powerful thing you can communicate, not only to decision-makers but also to your volunteers. They will be thrilled to hear how much they are making a difference quantifiably and specifically.

- **Any Grant-Required Outcomes** -- The people who fund your program may also have specific outcomes they'd like you to track. They are generally associated with the services you provide. Be sure to check your grant requirements for these and their reporting due dates. If you don't already have one in place, set up a tracking system and train volunteers and staff on what they need to document. Get your team involved and active in helping you. Don't wait until the grant report is due to track down what you need.

Tip 17: Design Teams and Write Up Job Descriptions

To be truly effective as a manager, everyone can't need your time all the time. If you allow yourself to be overloaded, it will detract you from achieving your program's overall purpose. So, you'll need to practice smart delegation.

Shift to others the decision rights, roles, and ability to connect for information, as appropriate. When deciding what to delegate, keep the tasks that only you can perform on your plate. Then, explore which people and teams can be assigned to help complete the rest. You may have to fill in from time to time, but at least you'll be sharing the load with volunteers who really do want to help.

To help volunteers connect with work that will be meaningful to them, use team descriptions to communicate the opportunities currently available. Be flexible enough to add teams if volunteers indicate an interest in an area that doesn't currently exist and would be helpful to the program in the long run.

Volunteer Team Ideas

Below are some possible teams, but they'll really depend on your program needs and the interests of your volunteers. Note that volunteer recruitment and training teams can be made up of volunteers, too. And, there is no reason why qualified volunteers can't lead teams as well.

- Speakers Bureau
- Volunteer Recruitment
- Volunteer Training/Mentoring
- Communications/Marketing
- Office Administration
- Direct Service Assistance
- Direct Service Delivery
- Reception/Scheduling
- Fundraising

Quick and Dirty Team Design

Designing your team structure, or organization chart, doesn't need to be a headache. Try this process to get it done in a few hours.

- Start by brainstorming all the tasks that need to be completed.

- Write one task per post-it, and try to be as exhaustive as possible.

- Don't decide now who will be responsible for each task.

- Next, determine which tasks can only be done by you.

- Remove them from the larger group, and cluster them together.

- Then, cluster the remaining tasks into groups of similar tasks or that make sense together. These are your teams.

- Name them, and type up a team description with a bulleted list of tasks transcribed from the post-its.

- Then, develop one-page volunteer position descriptions, or team charters, for the jobs that would be needed to complete each team's tasks.

Tip 18: **Design Flexible Volunteer Roles**

In addition to designing teams with compelling work to do, volunteer roles also need to be developed to accommodate a variety of scheduling needs and preferences. In order to engage as any people as possible, give potential volunteers the freedom to choose from a wide array of ways and times to help. Be as flexible as you can without compromising your program's mission and key objectives. There are a myriad of ways to structure volunteer jobs to make the most of the precious time volunteers have to give.

Tip 19: Build a Relationships with Current Volunteers

You may be lucky enough to have volunteers already working when you start your job as volunteer coordinator. Use this tremendous resource to your advantage. Don't let them sit around waiting for direction, as you get up to speed.

Get them involved in your ramp up as trusted advisors. Gather feedback through focus groups, surveys, task forces, and good old-fashioned one-on-one conversations.
Veteran volunteers will be more than happy to share their knowledge and suggestions. And, they'll be pleased they've been included in your decision-making process.

If you want their feedback, keep your leadership process transparent.
Simply describe the specific decision that's going to be made, how it's going to be made (by you alone, by voting, by the team consensus, etc.), and how they can participate. If you are going to make the decision, share what direction you are leaning and ask them if there is anything you are missing. Volunteers won't mind that

Flexible Volunteer Engagement

- **Seasonal** -- Volunteers work in the season they are available or when they are needed

- **Substitute** -- Volunteers act as a back up for another volunteer, as needed

- **Rotation** -- Volunteers share the job, taking turns

- **Segmentation** -- A specific time-intensive or high responsibility task is broken up into more manageable parts

- **Online** -- Volunteer provides services off-site, scheduling their time at their convenience, usually using technology

- **Job Sharing** -- Two or more volunteers share a job, performing the same or complimentary duties

- **Team Volunteering** -- A group of volunteers takes on a time-limited project

- **Family Volunteering** -- Families volunteer at the same time, collaborating on a task or project

you are making decisions on your own. They will mind, however, if the decision-making process is vague and confusing.

Once you've decide on any significant changes to your program, it helps to set up a meeting to orient volunteers to any new priorities or processes. By clearly communicating how things will change and why, and asking them to share what they'll need to make the switch, you invite them to be part of the process of change. If you haven't made final decisions on everything, that's okay. Use this time to get their feedback before you settle on any ultimate solutions.

"As a volunteer for three organizations, I just want to be respected. I want to share ideas that will make the organizations better. I do not want to be pressured into giving more than I am capable of giving. I do not want mixed messages coming from management. Treat all volunteers equal no matter how few hours they can give."

-- Deanna M. Tacoma, WA

Tip 20: Actively Promote Word of Mouth (WOM) Marketing

Once you've got your program in order, you'll be ready to recruit your first round of volunteers.   Posting your positions online, both on your organization's website and with online services such as VolunteerMatch.org and Idealist.org, is essential. Also plan to work closely with your local volunteer center, if you have one in your area. Also, don't neglect an area that gets little attention and yet it is the number one way volunteers are recruited -- word-of-mouth (WOM) marketing.

Word of mouth marketing has always been an effective strategy, even more so in today's world. Audiences have become sophisticated media consumers and are able to weed out irrelevant information that comes their way. Traditional marketing methods simply don't work as well as they used to. In recent years, old school advertising has evolved into two-way, relationship marketing that has exponential potential though social media.

What does this mean? First, most people tune out the mainstream advertising game. They just aren't paying attention anymore. Instead, people from all walks of life are creating and sharing their own content, information they care about...and everyone else is reading it. Social media technology has helped this along, too, by expanding exponentially what used to be shared friend-to-friend, one-to-one.

What does this mean for your program? Instead of wasting too much time courting the mainstream media, spend your time building trust and "mission moments" with current volunteers. Give them something absolutely fantastic to share -- something surprising, delightful, exceptional, unusual, etc. And, make sure your volunteers' positive experiences are easy to distribute through video, photos, email, and social media.

Be worth taking about. This is the best way to build buzz about your volunteer opportunities and stimulate excellent word-of-mouth marketing.

Cultivate word-of-mouth marketing further by focusing on the support you offer volunteers. Help them achieve their personal aspirations by removing as as many barriers as possible to reaching them. This doesn't always mean relaxing expectations or accountability, but rather focusing on eliminating any speed bumps that keep them from creating the change they hope to realize.

> "As a volunteer, I wish the manager had been clear (and truthful) about the timeline and the time required! Plus a truthful job description. By the latter, I don't need a 'corporate' JD, but I do want to know what's expected, and how we (yep that's the volunteer and the manager) will measure that. And, then I'd really appreciate a check-in during those first 90-days. Lastly, I appreciate on any volunteer job having a 'space' where I can go and get quick answers related to the volunteer position/program -- e.g., an on-line community.
>
> As a volunteer manager, I try to make sure that the volunteer has a clear picture of what 'done' looks like and when 'done' needs to be accomplished."
>
> -- Peggy H., Baltimore, MD

Story Ideas

Here are some possible story topics to get you started:

- Your organization or program history
- The success story of one client
- A day in the life of your program
- The story of an interesting volunteer and why they donate their time

The more in tune your volunteers are with your mission and the more impact they help create, the more satisfied they are. This satisfaction drives powerful word-of-mouth marketing that money simply cannot buy.

If you don't have any volunteers yet, start with more traditional recruitment methods, but plan now for the amazing experiences you will offer volunteers once they are on board. And, by the way, there's no reason you can't develop your client services using word of mouth marketing, too.

How to Reduce Affinity Distance and Increase Team Trust

- Bring volunteers from different departments together (online or off) increase functional partnerships
- Ensure that volunteer teams are layered with diverse cultures, communication styles, and points of view
- Facilitate candid, respectful conversations to build shared understanding; develop shared norms for virtual communication
- Openly celebrate differences and welcome a variety of modes of online communication
- Actively recognize volunteer contributions based on their value rather than their job title
- Acknowledge volunteers as equal contributors in the organization's mission delivery
- Encourage visits and participation of organizational leaders in virtual volunteer events
- Ensure that all volunteers have equal access to online tools
- Highlight "friends in common"
- Weave informal social interaction and chat into virtual meetings and training
- Arrange face-to-face meetings at the beginning of projects, when possible, and include social mixes in the agenda
- Set up an online "buddy system" for new volunteers to welcome them and orient them to the tech tools in use
- Facilitate online "getting to know you" exercises and chats to help volunteers surface commonalities.
- Work with virtual volunteers to develop project-based charters that include a collaboratively-developed vision statement
- Actively share individual volunteer and team accomplishments in social networks and the organization's website
- Consistently and explicitly link volunteer activity with program goals
- Offer "virtual tours" of the organizations "back office" and "insider" operations
- Invite volunteer leaders to present by video chat at board and coalition meetings

Tip 21: Recognize Both Individual and Team Successes

Last but not least, plan your volunteer recognition strategy. Volunteers are motivated and and satisfied when they are able to contribute to something greater than themselves. So, help them understand, at each step of the way from recruitment all the way through service, just how critical they are to the program's mission fulfillment.

There are an endless number of ways to acknowledge volunteers. Boring plaques and certificates should not be your first choice. Acknowledge the specific achievements of individual volunteers and volunteer teams in light of your program goals and objectives. Sharing program metrics and impacts is one way, but not the only one by far.

Sharing the stories of how people's lives were changed through their hard work and commitment is another way to show your gratitude. Reward them with additional freedom or responsibility, privileged "sneak peaks" or backstage tours, invitations to act in an advisory role with decision-makers, or discounts on tickets or services. These are just a few ways to demonstrate to volunteers that they are truly valued. If you have the flexibility to tailor your recognition activities to individual volunteers to match their personalities and key motivators, all the better.

Tip 22: Fine Tune Your Virtual Communications

In today's world, most volunteers are both virtual and mobile -- even those that work on site -- because they access information, communicate, and collaborate via a variety of personal virtual devices like tablets, smart phones, and computers.

The future success of your program may hinge on whether or not you are prepared to support volunteers in this new virtual environment.

Virtual leadership expert Dr. Karen Sobel-Lojeski has conducted extensive research on how technology affects performance on the job. In her book, *Leading the Virtual Workforce*, she presents the idea of "virtual distance," which is exacerbated by three factors:

1. **Physical Distance** -- for example, the different work schedules, departmental silos, and worksites

2. **Operational Distance** -- caused by everyday communication breakdowns, multitasking, and low morale

3. **Affinity Distance** -- reflecting the affect of personal relationships, cultural dynamics, interdependence on productivity

Of the three, addressing the Affinity Distance between team members (how teams are connected emotionally and mentally) can have the most impact on how well virtual

To Do List

- ☑ Craft a "Volunteer Bill of Rights"
- ☑ Develop policies, procedures, and paperwork
- ☑ Choose which metrics to track
- ☑ Set up a performance management system
- ☑ Create volunteer team and position descriptions
- ☑ Set up meetings with current volunteers
- ☑ Develop plan to promote word of mouth marketing
- ☑ Plan annual volunteer recognition activities
- ☑ Set up a volunteer communication system that increases teamwork and reduces "virtual distance"

teams, including volunteers, can work together.

The most direct way to address this gap is to focus on limiting perceived Affinity Distance. There are many approaches you can take to make sure everyone feels like they are an important part of the larger team, even if they work in different places and at different times of the day or week.

Case Study: Building a Youth Mentor Program from Scratch

When I first started working with volunteers I was excited and also very nervous. I had been hired by a San Francisco-area nonprofit to design and build an employment and training program for homeless youth. I arrived fresh-faced and eager, direct from several years of outreach and communications work for a federal youth employment program. I had no direct experience with program or volunteer management, but I had a lot of big ideas about how a youth program should be run. Now it was time to put my money where my mouth was.

In a bold bid to win the job, I emailed a program design to the Executive Director the day after my initial interview. I was convinced that a service mix of job readiness training, basic education, and day labor opportunities would be the support

these youth needed to transition off the streets, into work, and on to a better life. Another critical element, I felt, was the presence of caring people, alongside paid staff, who could provide support and share their own life experiences one-on-one. So, I also recommended we start a mentor program.

To my delight, I was hired. I soon realized that most of the work hiring staff, setting up the facilities, building partnerships with other programs in the agency, working with the foundation who had provided the seed money, and yes, recruiting and supervising volunteer mentors, would all fall on my shoulders. It was a daunting assignment. The program development went smoothly, staff were hired, and we began to recruit youth to participate. But, I still had work to do. I had to find my first volunteer mentors and right away.

I can still remember the horrible sense of panic I felt about what to do and where to start. What if my worst fears were realized? What if I couldn't recruit and keep a single mentor?! It was almost paralyzing. Luckily, I had the support of development staff to

help me reach out to supporters. The agency already had a long-standing volunteer program, which did well to place volunteers in 6-month positions in a variety of program areas. My boss, however, felt that my program needed a special kind of support, from people who were willing to commit on a deeper level. And, she felt I was the person to lead the effort to find them.

I didn't think it would be an easy sell. Our youth had criminal records, drug problems, and were not always the most reliable. Most had come from troubled homes, many were struggling with issues of sexual orientation and identity, and some were dealing with HIV infection and mental illness. To compound things, we had a the enormous stigma of homelessness to overcome. We needed people who were willing to give these kids a chance.

It was a tall order, but we set out to make it happen. I worked closely with leadership to put together an amazing cultivation breakfast. The board and executive staff helped me develop a list of invitees. Over a hundred people attended our breakfast, hosted in a fancy high rise office building in downtown San Francisco.

There, we presented our case. We invited some of our most articulate youth to talk about why the program was special to them. Our board president asked for support in whatever way people could provide. A surprising number people signed commitment cards, and I spent the next month conducting individual meetings with each and every potential supporter.

In spite of the event's success, however, I still didn't have my volunteers and was beginning to lose faith. Then, I received a call from a member of the San Francisco Bar Association. They had heard we needed help.

Did I still need volunteers? Could they lend a hand? After I hung up, I let out a whoop of joy! The Bar Association representatives immediately set out to recruit for me. They found people from within their organization and connected with friends outside it who could help.

And just like that, I had fifteen mentors ready for matching.

I learned a lot of things about leading volunteers from this experience, most importantly, that I didn't need to do it all myself. My mentors decided to meet regularly together. They hosted potlucks rotated our meetings between their homes. I attended only in a supporting role.

I also learned that I needed to maintain firm program guidelines. I had to be there for private conversations with mentors and mentees as they struggled to build trust, and I had to fire a volunteer for transgressing program rules. Despite these challenges, I was able to witness over and over the transformation of youth as they moved off the streets and finally made it on their own, largely due to the support of caring, generous volunteers who weren't afraid to give it a try.

BONUS: Timesaving Tips

Nonprofit staff are always looking for ways to save time. Here are a few good ideas that might help:

- **Assemble Your Marketing Raw Materials In One Place** -- Post your logos, boilerplate text, approved photos, news release templates, brochures, public service announcements, etc. in an online library that your team easily get to. Also, create a communications style guide that includes all the graphic and text rules your program lives by (there are many samples on the internet). This will help your team to be self sufficient and reduce document review time.

- **Group Similar Tasks** -- You waste time switching from report writing to email to photocopying to making phone calls. If you group them, you'll save the time you waste refocusing your attention each time you switch gears.

- **Minimize Interruptions** -- Block out "me time" on your calendar, and guard it with your life!! Make your calendar public, so your team can see where you are. And, when you need quiet, close your office door (or block off your work space). Let folks know that when the door is closed (or the do not disturb sign is up in front of your cube), you should not be interrupted unless there is an emergency. Do this at select times, but not all day.

- **Agree to Team Email Norms** -- Do it as a team, and be sure everyone agrees. If they don't, you be the tie breaker. In particular, set up guidelines for who needs to be copied on specific types of emails. Your goal is to un-clutter your inbox by reducing the number of unnecessary emails you receive. To limit the exasperating "reply all" syndrome, use the BCC field when addressing group emails.

- **Configure Your Email Software** -- Make it work for you. If possible, have it sort and file incoming email, use your out-of-office assistant when you're on the road, and set up a priority inbox.

- **Think Through Big Decisions** -- Use mind mapping and disciplined problem solving steps to determine the root cause of an issue before developing a solution. Teams waste a ton of time rushing to the solution without deeper consideration; then, they're back to the drawing board when it doesn't work.

- **Plan Annually** -- Don't plan by the seat of your pants. Put together an annual calendar that includes grant and reporting deadlines, special events, holidays, volunteer recruitment campaigns, volunteer training dates, etc. Then, develop specific, but simple, work plans for each project you have on the calendar. This will help you delegate more effectively, and will help your team be better prepared.

- **Schedule Regular Volunteer Orientations** -- Include them in your annual calendar (the first and third Wednesday of the month, for example) and assign people (staff or volunteers) to conduct them. Invite anyone who's interested in volunteering to come down and learn more about your program then. Make sure you schedule both day and evening orientations so that applicants with different schedules can attend. You can also post an on-demand webinar online, so that prospective applicants can get to know you from anywhere.

- **Use Standardized Training Materials** -- Everyone wastes a tremendous amount of time if they each decide to create their own, unique volunteer orientation, for example. It's just not necessary.

- **Set a Social Media and Internet Timer** -- Every day, decide on a specific number of minutes you'll spend looking at social media and surfing the internet (work related, I mean!). Then, set your timer. When it dings, you're done!

- **Host Staff Meetings Standing Up** -- Huddle with your team versus sitting around the big table in the conference room. It will minimize meeting pontification, guaranteed! People will get to the point, and you can move on to the more interesting tasks of the day.

Volunteer Management Professionals …

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