

# THE **VOLUNTEER** ENTERPRISE: building capacity for civic engagement



ACTION **STRATEGY** SERIES:

## **Organizational Readiness and Management Brief**

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## ACKNOWLEDGEMENTS

### About the National Human Services Assembly

The National Human Services Assembly is an association of the nation's leading national nonprofits in the fields of health, human and community development, and human services. Many of the member organizations are national offices of large networks of local health and human service organizations. Others are national research or resource organizations or national programs. The National Assembly is a learning community where leaders with parallel responsibilities at different national nonprofit human service organizations (e.g., CEOs, HR directors) share knowledge and expertise about their work in this sector.

### About this Initiative

In 2004, a groundbreaking study revealed the factors *behind* our "business as usual" approaches to volunteer resource management, illuminating the root causes of why volunteer mobilization rarely reaches full potential. ***Volunteer Management Capacity in America's Charities and Congregations*** was the first national study on the **ability of the nonprofit sector to engage volunteers** (Urban Institute, Corporation for National & Community Service, UPS Foundation, USA Freedom Corps). In response, the National Human Services Assembly crafted ***From Research to Action***, sponsored by the UPS Foundation – an executable blueprint of capacity building strategies. While myriad factors influence effective volunteer resource management, ***From Research to Action*** spotlights four essential action strategies that dramatically increase nonprofits' ability to mobilize volunteers for community change and civic engagement. **The first of these action strategies, Organizational Readiness and Management, is detailed in this brief.**

These two studies – with capacity building as the foundation and the four essential action strategies as the framework – have inspired collaborative action among nonprofits, funders, and business and community leaders. The UPS Foundation responded to the challenge documented in the studies by establishing a fund to test strategies for strengthening volunteer resource management capacity. Called **Volunteer IMPACT: A Fund for Change through Volunteerism**, this initiative attracted other funders, who joined together to fund innovation grants. The National Human Services Assembly serves as the administrator of the Volunteer IMPACT Fund.

The National Human Services Assembly has been gathering and synthesizing the rich experiences from the Volunteer IMPACT Fund grantees and other diverse initiatives in the volunteer resource management field – in essence, taking their valuable lessons learned and promising practices from the "margins to the mainstream." ***The Volunteer Enterprise: Building Capacity for Civic Engagement*** is a series of briefs which document successful approaches, fresh ideas, promising practices and capacity building initiatives. This series is the culmination of that work – and yet, it's also the beginning as we continue to gather your insights, innovations, promising practices, fresh approaches, and even challenges, to build our capacity to mobilize volunteers.

## Join the Effort

There are lessons out there – practical, replicable examples for building nonprofits' capacity to create change in the community through the power of volunteers. Visit [www.volunteerinnovation.org](http://www.volunteerinnovation.org) to learn more and take an online survey to share your experiences with colleagues nationwide and beyond. It's all about collaborative action. Share your wisdom.

## This initiative was made possible by generous funding from:

**The UPS Foundation**

**AT&T Foundation**

**Capital One**

**The Home Depot**

## This initiative was made possible by Volunteer IMPACT Fund grantees:

**Action Without Borders/Idealist.org**

**American Humanics, Inc.**

**Central New Mexico Community College Foundation**

**Minnesota Association for Volunteer Administration**

**Mount Wachusett Community College Foundation, Inc.**

**National Council on Aging**

**RGK Center for Philanthropy and Community Service**

**Temple University Center for Intergenerational Learning**

**The Appalachian Trail Conservancy**

**The Forum for Youth Investment**

**The Free Library of Philadelphia Foundation**

**United Way of America**

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THE **VOLUNTEER** ENTERPRISE:  
building capacity  
for civic engagement

ACTION **STRATEGY** SERIES:

**Organizational Readiness and Management Brief**

## OVERVIEW

Leadership  
Connection  
Drive  
Collaboration  
Focus  
Commitment  
Innovation  
Action

...these are all necessary attributes nonprofits need to meet ever-increasing demands in communities across this country. This series takes an in-depth look at one of the most significant ways you can bring these attributes to life across your organization - the power of effective volunteer engagement.

Consider the people and the causes you care about. At-risk youth, hunger and homelessness, education, emergency response, the threatened environment, elders who want to remain independent.

Whatever your vision, whatever your mission, positive impact is the bottom line for any nonprofit organization. It takes more than just a desire to make a difference. It takes a plan to get it done, and the resources – including people resources – to implement the plan.

In order to build a high impact organization, involving volunteers must be **central** to the way we do business rather than an afterthought or add-on activity. Weaving volunteerism into the fabric of nonprofits' operations means taking on a more systemic and strategic approach – one that requires organizational leaders to integrate what we know about effective volunteer resource management, and emerging tools, techniques and insights. This series is designed to shine a spotlight on **practical methods** that add up to a new paradigm for how organizations engage volunteers – we call this comprehensive approach “the volunteer enterprise.”

### Rich Tradition of Volunteerism

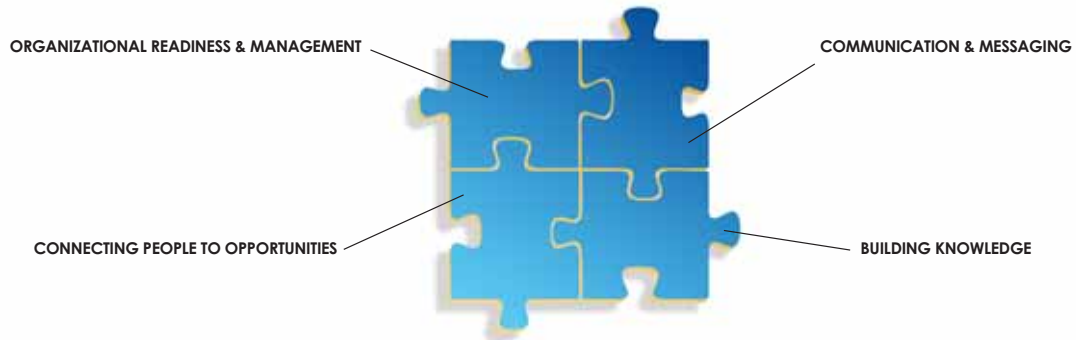
In 2007, nearly 61 million people volunteered more than 8 billion hours of service, according to the Corporation for National and Community Service (visit [www.volunteeringinamerica.gov](http://www.volunteeringinamerica.gov) for more information). This nation has a strong tradition of volunteerism – giving back to the community as individuals or through nonprofits, taking care of family, friends and strangers alike – service is part of the American fabric. Broadly, volunteerism exists in every culture, even if it isn't called volunteering. However, the profession of volunteer resource management is a 20th century phenomenon.

Prior to 2004, relatively little had been studied or examined about the nonprofit sector's capacity to mobilize volunteers. The ground-breaking Urban Institute study, **Volunteer Management Capacity in America's Charities and Congregations**, represented the first comprehensive look at nonprofit interest in and preparedness for increased civic engagement. The study identified a central challenge – **the lack of organizational capacity to engage and mobilize volunteers**. There has always been a willingness to offer opportunities for people to volunteer their time and talent for positive change. However, many nonprofits have not always known the way to do it effectively.

The UPS Foundation and National Human Services Assembly's response, **From Research to Action**, offers pinpoint focus on the barriers to greater volunteer involvement and ultimately community impact. It lays out four themes, or “action strategies,” that when implemented together, dramatically increase organizations' ability to mobilize volunteers.

Think of your organization as a system of interconnected parts working together towards a common goal. The four essential action strategies identified in **From Research to Action** form a similar system – designed to build on and complement the power of the others.

## FOUR ESSENTIAL ACTION STRATEGIES FOR BUILDING CAPACITY



While the study *From Research to Action* does not necessarily suggest they be undertaken in any particular order, it is clear that the four action strategies work together for optimal traction.

**Building readiness provides a solid foundation that...**

**Illustrates how to communicate your organization's story, which...**

**Helps win resources to better connect people to opportunities and...**

**Gather new learnings to build volunteer resource management knowledge for your organizations and the field.**

### About This Series

The National Human Service Assembly's series, *The Volunteer Enterprise: Building Capacity for Civic Engagement* explores the four essential action strategies - capturing volunteer resource management wisdom from organizations around the country into four corresponding briefs.

Each brief provides an abstract of the work of a number of the Volunteer IMPACT Fund grantees who were funded to test specific new approaches to one of the four major action strategies above. Each report concludes with a practical at-a-glance synthesis of the promising practices, tips, techniques, and lessons learned from Volunteer IMPACT Fund grantees and practitioners around the country, broken down into three levels:

- **Break-In Lessons** – basic actions that establish a foundation on which organizations can build, leading to a new way of doing business.
- **Break-Through Lessons** – mid-level actions that exemplify the kind of promising practice that will help organizations sustain momentum.
- **Break-Out Lessons** – high level actions that have a transformative affect on the organizations' capacity to engage and involve volunteers.

**Tested solutions.**

**Practical answers.**

**A framework to build the nonprofit sector's capacity.**

The briefs in this series take a 'pracademic' approach – examining grantees' and others' efforts to provide both a conceptual framework and practical steps organizations of any size can take to enhance their ability to mobilize volunteers for change. The lessons learned from Volunteer IMPACT Fund grantees and contributors throughout the sector provide a concise distillation of powerful examples that, where applied, have already transformed volunteer capacity to impact communities.

## The Power of Collaborative Action

The *Volunteer Enterprise: Building Capacity for Civic Engagement* is the product of collaborative action – catalyzing the knowledge, connections, resources, experience and wisdom of myriad contributors. The learnings, promising practices, insights and innovations will continue to grow, change and adapt over time as individuals and organizations add to the body of knowledge. Through the National Human Service Assembly’s new **Center for Volunteer Innovation**, this series and offerings to come will spotlight strategies that enable organizations to move from treading water to getting traction in volunteer engagement,

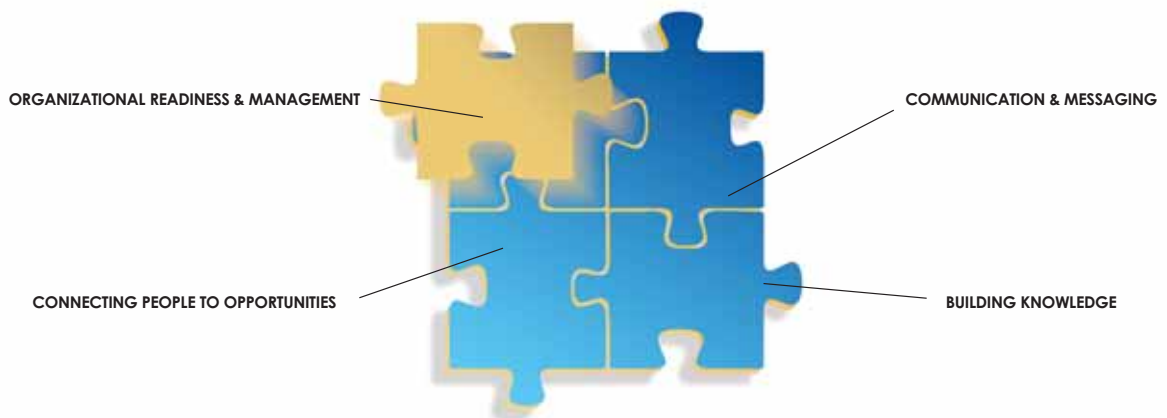
THE **CHALLENGE**: CAPACITY

THE **FOCUS**: IMPACT

THE **ANSWER**: A PLAN OF ACTION

## Organizational Readiness and Management Action Strategy

### ORGANIZATIONAL READINESS AND MANAGEMENT ACTION STRATEGY



## THE READINESS GAP

### ready – adj.

1. prepared for something that is going to happen
2. finished or completed and so able to be used immediately
3. eager, willing or prepared to do something
4. prepared or blended in advance, and able to be used with very little additional preparation

We all have our own idea of what it means to be “ready.” Webster’s defines it several different ways. But in real life, what does it mean in your organization?

More than 9 in 10 charities and congregations say they are ready to take on more volunteers. When you add it all up, they say they can accommodate almost 6 million new volunteers! Given the challenges nonprofits face and the missions before them, most would likely describe themselves as ready. However, there is a difference between willing and ready.

Imagine you had access to 20 or 30% more volunteers tomorrow. Would your infrastructure be ready to immediately accommodate the needs and manage the work of more individuals? Would your volunteer coordinator – if you have one – be ready to support the work of an influx of new volunteers? Are there systems in place to ensure a great volunteer experience and that their efforts make a positive impact on your organizational goals? Are you really ready? Being truly ready to involve and mobilize volunteers doesn’t have to be an exercise in wishful thinking.

Research clearly shows a gap in readiness – while organizations are willing to take on additional volunteers, there is a real world shortage of effective volunteer resource management (VRM) practices in organizations across the civic sector. *Volunteer Management Capacity in America’s Charities and Congregations* noted that only about a third of organizations that engage volunteers employ paid volunteer coordinators. Approximately half of these volunteer coordinators spend less than 30% of their time on volunteer coordination. One in three volunteer coordinators has received no training in volunteer resource management whatsoever. Yet, research and experience show that training staff how to work with volunteers can address a range of challenges and closes the readiness gap.

## THE PLAN OF ACTION: ESTABLISHING VOLUNTEER RESOURCE MANAGEMENT CORE COMPETENCIES

*From Research to Action* identifies establishing core competencies in volunteer resource management (VRM) as the primary tactic for building organizational readiness. What does that mean?

What does it mean for an organization to recognize and build volunteer resource management core competencies?

It means making VRM so well understood and executed in your organization that it actually becomes a core part of how you do business, and even a competitive advantage.

What does it take to get there?

It takes training paid staff, volunteers, and even other organizations with whom you work, in proven VRM principles, skills, standard knowledge, and effective practices.

*Volunteer resource management training for paid staff ranks at the bottom the list of volunteer management practices actually implemented.*

*Approximately 1/3 of paid staff volunteer coordinators receive no volunteer resource management training.*

*Volunteer Management  
Capacity in America's Charities  
and Congregations*

Imagine being asked to build a bridge across a swiftly flowing river without the tools or the expertise to do it.

Lives may depend on the sturdiness of your bridge. You may be highly motivated to get to the other side. You might even have some ideas where to begin. However, it's a safe bet that you would hesitate to begin such an endeavor without the training, skills and tools to get the job done. Perhaps you can figure it out. But is it worth the risk?

The current climate in the nonprofit sector is like that swiftly flowing river – with a strong need to build a bridge from willingness to readiness to boost performance in high impact ways. One of these key areas for moving forward is effective engagement of volunteers. With millions of nonprofit organizations and government agencies all competing for volunteer talent, and funders increasingly focused on proven performance to guide their giving, training in effective VRM is essential to amplifying mission impact.

Relatively few organizations have adopted standard VRM practices – generally agreed upon methods, techniques and processes similar to (but not exactly the same as) human resources management and supervision for staff. There is one VRM practice cited in the Urban Institute report that has a **direct impact** on organizational readiness – “training for paid staff in working with volunteers.” The report noted that **training staff and volunteers** how to work with and organize volunteers can address a wide range of challenges. Remarkably, **training in volunteer resource management is the least implemented VRM practice** in U.S. nonprofits.

To put a sharp point on this factor - training is the least implemented of all effective VRM practices despite its importance. Think about it. The formula is clear.



Our grantee organizations forged clear, replicable paths to success in this area. The following chronicles the practical application of lessons that impact organizational readiness and management from Volunteer IMPACT Fund grantees and others in the field. As you read these examples, look for similarities to your own organization, opportunities to experiment with what others have found successful, and consider what lessons from your own organization you might like to offer in this area.

## WHAT WE LEARNED

Each Volunteer IMPACT Fund grantee organization had a unique experience capturing important volunteer resource management (VRM) learnings about readiness to mobilize a volunteer force. There were anticipated challenges, a few surprises along the way, and certainly many common threads.

### The Big Picture

From the thirty thousand foot view, we identified notable shifts in the perception and practice of VRM that impact nonprofits' readiness to mobilize and engage volunteers. They moved...

FROM:	TO:
Volunteerism and volunteer resource management as a best kept secret	Positioning volunteerism as an organization-wide opportunity – selling it to the C-Suite and throughout the organization as critical to achieving the mission. The C-Suite is the group of “chief officers” of a business organization who share nearly equal authority in their respective functional areas of responsibility; the CEO and officers that surround him or her.
Volunteer resource management (VRM) as merely a collateral duty	Raising the awareness and perception of the profession and professional development and bringing on staff and volunteer managers dedicated to VRM
Simply bringing on more volunteers (without consideration of the infrastructure needed to support them)	Building capacity to make the volunteer experience rewarding and impactful by fortifying the infrastructure with trained, experienced volunteer managers and meaningful volunteer roles
Little to no VRM training	Repositioning VRM training as mission critical by: <ul style="list-style-type: none"> <li>• Offering accessible VRM training to a broader audience, to your own staff and even externally, extending opportunities to other organizations in the community</li> <li>• Integrating VRM training into the organization's overall professional development program(s)</li> <li>• Incorporating relevant advanced skills training</li> <li>• Delivering training in various ways such as training of trainers, executive education and peer learning</li> <li>• Providing creative incentives to encourage individuals and organizations to participate in VRM training</li> </ul>
Looking inward exclusively	Collaborative action around volunteer engagement – looking to broaden external relationships and partnerships with other nonprofits so that you can share lessons and overcome individual organization's limitations in volunteer resource management expertise by working together

How do these lessons from the thirty thousand foot level translate into models for building readiness on the ground? The following pages offer insights and examples of ways nonprofits just like yours took their lessons ‘from the margins into the mainstream’ of their operations.

## Lessons from the Margins to the Mainstream

**Position volunteer resource management as an organization-wide opportunity.**

**To build support for readiness activities, it is essential to illustrate to the C-Suite and the whole organization that volunteer resource management is critical to achieving the mission.**

**Making the business case for volunteer engagement as mission-critical to the organization overall helps gain support for working on readiness. Once you've made the business case, the justification for providing training in effective volunteer resource management is much easier to articulate - and more compelling.** This is the way to take VRM training from being viewed as a collateral duty and the least practiced VRM activity to the priority position it deserves. Just as staff managers are expected to garner the skills they need to organize, recruit, and inspire employees, mobilizing volunteer talent requires just as much skill and expertise. Communicating effectively about volunteerism and the efficacy of volunteer resource management ensures key decision-makers within the organization understand, accept and perceive VRM readiness as an investment in the overall success of the organization.

### Illustrate the “value proposition”

**The Minnesota Association for Volunteer Administration (MAVA)**, a statewide alliance of professional leaders of volunteers, used the estimated value of volunteerism in Minnesota as a catalyst to spark support for its IMPACT Fund initiative, **Volunteer Resources Leadership: Capacity Building in Minnesota**. Volunteers in Minnesota contributed an estimated 155.8 million hours of service in 2006, the third highest rate in the nation according to the most recent Corporation for National & Community Service trends report. When you do the math, at an hourly value of about \$19.51, the value proposition for increasing support for volunteerism in Minnesota is clear. MAVA understood that using data clearly illustrates the value of volunteer engagement. MAVA leveraged the data effectively as justification for funding, support from decision-makers, and statewide participation in its professional development efforts in volunteer resource management. While MAVA was able to compile new research by adding volunteer-related questions to the Minnesota State Survey to support their efforts, valuable data on levels of volunteerism in states and some cities is readily available for nonprofits to utilize (visit [www.volunteeringinamerica.gov/](http://www.volunteeringinamerica.gov/) for volunteering data for each state and select cities).

### Engage the decision-makers

**American Humanics, Inc.** is a 60-year-old alliance of colleges, universities, and nonprofit organizations dedicated to equipping college and university students to become skilled professionals and leaders in America's nonprofit organizations. AH invited faculty and Executive Directors of affiliated colleges and

universities to participate as stakeholders in a discussion about professional development. The group was invited to discuss several questions which proved central to galvanizing support for a VRM curriculum from the top:

- **Why should volunteerism and volunteer resource management be part of the organization's curriculum and competencies?**
- **What does the field of volunteer resource management look like?**
- **What are the issues, challenges and trends facing the field?**
- **How should the organization frame the field and build its curriculum?**

Together, the group laid the foundation for a compelling business case for developing a universally accepted VRM curriculum, which ignited the creation of a task force to identify competencies and take the work to the next level. By inviting stakeholders to play an active role in creating the vision for VRM at American Humanics institutions, they were able to create a **solid business case** and **achieve buy-in** from those who would implement the program. AH's model of engaging key stakeholders in discussing these kinds of foundational questions could be used by any nonprofit to build support for VRM curriculum development and training.

**Gain a clear understanding of gaps in VRM knowledge and skills to ensure that everyone is on the same page.**

**Organizations have a tendency to overestimate their readiness to take on new volunteers and sometimes underestimate what it takes to provide volunteer managers with the skills and knowledge to be effective in this important task.**

The more skilled a volunteer manager is, the greater the likelihood that volunteers will become and remain engaged in your mission. Yet our grantees' experience confirms that many people responsible for working with volunteers have little background in volunteer resource management and require baseline training to work more effectively at mobilizing and engaging volunteers.

**Formally or informally assessing volunteer resource management knowledge, skills and practice within your own organization illuminates the gaps and clarifies the training and resources needed to fill those gaps.** The primary questions include:

Who works directly with volunteers to accomplish the organization's mission? Did they come into that position already possessing volunteer resource management experience? Have they ever received VRM training? If so, when did they receive that training and what did it entail? If they've never received VRM training or have not had professional development in a long time, then there is a rich opportunity to dramatically improve VRM practice and the ability to manage, inspire and mobilize volunteers by making training available.

Answering these questions provides you with a basic understanding of your organization's readiness to build VRM capacity. The most successful grantees took at least two steps beyond this point.

- **First**, within their own organizations, they extended VRM training to people who *do not work* with volunteers regularly as a part of their duties, but would benefit from gaining an understanding of volunteer resource management principles and practices. This includes members of the leadership team who make decisions that impact volunteer efforts throughout the organization. For example, one grantee integrated volunteer resource management into the fabric of all professional development and training within the organization, with volunteer coordinators/ managers receiving the most intensive VRM training.
- **Secondly**, the grantees realized that to be most effective in accomplishing their own mission, they needed to understand the readiness of other organizations to mobilize volunteers as well.

### First, get on the same page

The **Free Library of Philadelphia** is one of the largest public library systems in the country. Through its 54 branches, the Free Library is committed to ensuring access to information and learning for the community. Initially, they planned to use their Volunteer IMPACT Fund grant to launch an online Volunteer Manager's Resource Center, consistent with their commitment to connecting people to resources and providing access to information. After initial efforts to build the online resource center, it became evident that the more immediate need was to establish common ground among potential users of volunteer management resources in the Philadelphia nonprofit community.

The Free Library experience is similar to that of other IMPACT Fund grantees – they spent the first phase of the project connecting with nonprofits and local agencies, conducting meetings to discuss VRM practices and strategies. Typically, needs and gaps in VRM experience and knowledge emerged. The Free Library discovered that before even contemplating building a shared online resource, there was a greater need than expected to first enhance cooperation among agencies and provide the very basic VRM resources on the ground level for agency staff managing and working with volunteers. Finding common ground and establishing agreed upon baseline VRM learning became the priority. The Free Library team's willingness to step back from the original goal of an online resource center to focus on a grassroots effort to build knowledge, skills, and practice to a common level has benefited organizations throughout the Philadelphia area. The Free Library and its potential users needed to be on the 'same page' before they could turn the page towards more robust volunteer resource management practices.

### Allay C-suite concerns

The **RGK Center for Philanthropy and Community Service**, an integral part of the University of Texas' LBJ School of Public Affairs, positioned VRM as mission-critical by focusing directly on the C-Suite – that is, the

'corner suite' where decisions are made - with their **Volunteer Champion Initiative**. They noted the lack of high level support for volunteer resource management as a major challenge to gaining the traction needed for volunteer engagement capacity. RGK convened a series of focus groups with Executive Directors to understand and gauge their concerns, insights, and challenges. They used the data collected to design and develop VRM training and materials that deal directly with the issues broached by nonprofit leaders. Most notable about their experience is the fact that they dealt directly with executives who, at first blush, appeared to prefer not to involve volunteers. **RGK discovered that some Executive Directors are not so much resistant as they are in need of a clearer understanding of volunteer engagement.**

According to their results, Executive Directors were not necessarily negative about volunteerism, but rather needed to know *how to*:

- **Engage volunteers in meaningful work that clearly supports the mission**
- **Negotiate boundary issues with volunteers - that is, clarify volunteer and staff roles**
- **Effectively engage episodic volunteers**
- **Hold volunteers accountable**
- **Assess the public relations value of volunteers**
- **Quantify the return on investment for volunteerism in the organization**
- **Determine which organizational structures support effective VRM**
- **Find models of VRM best practices**

While these are major issues to answer, they provide a pathway to continued dialogue and planning, a foundation for ensuring support at the highest levels, and a framework for VRM training designed especially for those in decision-making positions.

In short, these grantees invested time up front to understand the level of VRM experience and skill at various levels within their own organizations and assessed the readiness of other organizations in their sphere of influence.

**Strengthen existing and develop new relationships outside of your organization to build overall volunteer resource management capacity.**

**Nonprofits don't operate in a vacuum. To some degree, they typically work collaboratively by networking with other nonprofits, the business community, government agencies, community leaders, community members, and others to accomplish their mission.**

The clearest success stories came from those nonprofits that took a hard look at their relationships and networks and thought creatively about new ways to collaborate with those outside of their organizations to build readiness. **They considered who they typically partner with to accomplish their work, but also identified individuals and organizations they could tap to fill the gaps in their own VRM experience or expertise.**

For example, several grantees connected with local and national volunteer resource management experts, serving two purposes: 1) making them part of the larger network as valuable advisors and curriculum developers; and 2) enabling the nonprofits to build on the good work already created by the VRM subject matter experts. Others developed new collaborations with organizations and individuals at the community level to reach new audiences and constituencies, empowering them to pass on VRM skills to their own networks.

### Create a “multiplier effect”

Central New Mexico (CNM) Foundation's **TAX HELP New Mexico Volunteer Capacity Building Initiative** expanded partnerships and provided baseline VRM training across organizations, resulting in statewide impact.

TAX HELP New Mexico served nearly 25,000 elderly and low income customers in 2007 free of charge, representing more than \$20 in million tax refunds. To reach more deeply into communities, they realized the need to expand their connections with community organizations. CNM targeted new community partners across the state with a keen eye towards those who could specifically address the twin goals of reaching Spanish-speaking and American Indian communities, and who were geographically located in underserved, rural areas. TAX HELP NM partnered with local universities and high schools, housing authorities and faith based organizations, pueblo service providers and even a credit union.

Their search for new connections and collaborations was an important tactic. To truly impact readiness and expand VRM capacity, CNM went one step further. ***These partner organizations became part of the stakeholder group to which TAX HELP NM offered volunteer resource management in-service training, thereby enhancing a wide range of organizations' ability to engage volunteers in activities that stretch beyond TAX HELP NM services.***

Likewise, this experience illustrates how readiness plays a key role in boosting volunteer participation in under-engaged groups - in this case, preparing to engage bilingual volunteers, people with limited incomes, and those who live in low income and rural communities. Not only did this extension of VRM training enhance readiness to meet the TAX HELP NM goals, it also prepared the local organizations to engage volunteers in their own missions for service at the community level – in essence, creating their own multiplier effect to sustain VRM readiness.

## Responding to broad scale societal challenges: collaborating to build VRM capacity across organizations and communities

There are some issues that impact across communities – hunger, homelessness, even the foreclosure crisis - heightening the need for a multi-organization, cross-sector response. Managing volunteer activities in a natural disaster is one such example. A *proactive* approach to organizing, managing and deploying volunteers for relief and recovery efforts is mission-critical and provides a model for preparing and responding to any complex societal issue with effective volunteer resource management.

**United Way of America's** Volunteer IMPACT Fund initiative, **Volunteer Management during Times of Crisis**, focused on building the capacity of 2-1-1 Disaster Volunteer Managers and relief organizations across the country to effectively mobilize and manage onsite and virtual (online) volunteers. The 2-1-1 system provides a universal abbreviated dialing code for 190 million Americans during crises large and small, including access to services as well as connection to volunteer opportunities. Developing well-trained volunteer coordinators *before* a disaster strikes is mission-critical to the 2-1-1 network, one of the difficult lessons underscored by the experiences from Hurricane Katrina and tested by the California wildfires.

Building and strengthening relationships was key to their success. United Way of America recruited a stakeholder team that would bring the best mix of skills, experience and expertise to the effort. They joined with the Alliance of Information and Referral Systems (AIRS) and 20 subject matter experts from FEMA, the American Red Cross, Volunteer Centers, the National Emergency Number Association, disaster consultants, local United Ways, the Points of Light Foundation, and others, to draft a comprehensive curriculum for volunteer resource management both locally and across regions. Each team member brought his or her own unique perspective and expertise. In the first six months, the team:

- **Conducted a series of interviews and teleconferences with national partners to gather information about their disaster volunteer management experiences**
- **Identified specific competencies that effective disaster volunteer managers must possess**
- **Defined the functions for volunteer managers and disaster volunteers in pre-, during and post-disaster scenarios**
- **Gained common acceptance of the curriculum content**
- **Reviewed literature and research issues**
- **Shared experiences through the lens of their own agencies**

Further, United Way of America convened a face-to-face meeting with the 2-1-1 team to review all of the collected data and materials to synthesize what had been learned into a set of competencies and content for the curriculum, ***Managing the Surge***. In the process, the team identified a largely untapped resource - Volunteer Centers with trained volunteer managers already in place.

By its nature, disaster relief creates major challenges for volunteer managers on the scene. UWA optimized the talents and strengths of partner organizations to jointly plan and develop the right training for the “proactive, prepared, and purposeful deployment “of volunteers. The general steps United Way of America and its partners took for leveraging relationships to build shared readiness can work for any organization working on a complex, cross-organizational issue. Visit the AIRS website at [http://www.airs.org/pub/pub\\_disaster.asp](http://www.airs.org/pub/pub_disaster.asp) to access these free resources on disaster volunteer management – examples of the kind of tools and curricula your organization could develop with others.

### **Encourage self-sustaining networks for peer-to-peer learning**

The **Minnesota Association for Volunteer Administrators (MAVA)**, introduced earlier in this brief, realized that a solid VRM infrastructure would need to be built on multi-sector collaboration – nonprofit, private, and public. They identified a series of challenges to organizational readiness across these sectors:

- **Inconsistent information and knowledge of volunteer resource management practices and issues**
- **Limited access to training at a reasonable cost, especially for small agencies**
- **No coordinated plan to establish baseline data to demonstrate the lack of access to VRM training**
- **Little technical assistance and consultation available for volunteer managers**

MAVA envisioned a different way of doing business across the state. They set the goal of expanding and strengthening leadership in volunteer management to address the Organizational Readiness and Management action strategy by 1) focusing on VRM infrastructure and organizations' ability to understand and practice VRM effectively throughout Minnesota, and 2) reinforcing networks of organizations that engage volunteers across Minnesota to create a structure for self-sustaining peer-to-peer professional development – that is, creating networks of organizations that support one another in the community, equipped with trained staff and volunteers.

First, MAVA funded the addition of volunteer-related questions on the 2004 Minnesota State Survey to obtain baseline data and to help establish the business case for focusing on volunteer capacity. They then conducted focus groups in various communities around the state targeting volunteer resource management leaders and other community leaders as participants. From those discussions emerged several critical findings. To dramatically impact volunteer mobilization in Minnesota, volunteer resource managers needed:

- **Peer-to-peer networking**
- **Access to professional development opportunities either locally or via distance learning**
- **A variety of resources to build capacity**
- **More effective ways to measure and communicate volunteer impact, and value, including the use of compelling stories**

MAVA initially targeted organizations to include in their 'network of networks' strategy based on the communities they represented – they particularly wanted to reach organizations that involve volunteers but do not have access to volunteer leadership training. These 'networks' included traditional nonprofits, literacy programs, membership organizations, alumni associations, and neighborhood nursing programs. Ultimately, MAVA implemented a plan to reach across the state by:

- **Creating a curriculum and certificate program that targeted new and intermediate level leaders of volunteer resource management as well as a session for Executive Directors**
- **Developing a group of more than 50 traveling trainers to fan out across the state into the targeted communities and networks**
- **Encouraging trainers to lead at least 15 VRM sessions for the networks mentioned above, particularly in underserved areas of the state and for those who have received no VRM training**
- **Providing ongoing training and technical assistance through their train-the-trainer program, webinars, and VRM 'best practice email alerts'**
- **Strengthening existing and building new networks by selecting individuals to become trainers**
- **Providing special leadership training to local leaders to build sustainability in their own communities**

Lesson learned: building volunteer resource management awareness, knowledge, and skills within your organization *and* for your external partners compounds the benefits, ensures consistency of practice, and deepens volunteer engagement in the community.

**Make VRM training relevant and accessible to those who need it.**

**Even the most well designed training is useless unless it is accessible. Not surprisingly, we learned that accessibility has at least two dimensions – content that meets the specific needs of the target audience(s) and VRM training delivered in several different ways for greatest accessibility and impact. The way grantee organizations dealt with these dimensions holds important lessons**

To be truly accessible, VRM training first has to be created with the needs of the audience in mind. As discussed to in previous sections, the most successful grantees **collaborated with a broad range of organizations, users, partners and others to develop meaningful VRM training and resources to dramatically improve readiness.**

During meetings and other gatherings, grantees collected promising practices, stories about successes and challenges, and tools and techniques. They capitalized on relationship building, harnessed the rich experiences they learned about, and poured them into the development of VRM training. From there, various mechanisms were employed to deliver the commonly agreed-upon training and resources where they were most needed. The Minnesota Association for Volunteer Administrators fanned out across the state to train others to become VRM trainers, thereby seeding the community with this brand new competency. Others like Idealist.org with its expansive Volunteer Management Resource Center or United Way's internal Knowledge Café, utilized the immediacy of the Internet for consistent dissemination of VRM training and resources. Another grantee, the National Council on Aging (NCOA), demonstrated a model for relevant VRM training.

### **Strengthen volunteer engagement through enhanced training of self-directed volunteer teams**

The **National Council on Aging's** (NCOA) mission is powerful and simple – To Improve the Lives of Older Americans. For almost 60 years, NCOA, a network of more than 14,000 organizations and leaders in the aging field, has worked to ensure healthy aging and independence for older people. One way NCOA accomplishes this goal is through **Wisdom Works: Building Better Communities** - a program which supports civic engagement for older adults through self-directed teams of volunteers who use their skills to build nonprofit organizations' capacity. NCOA's Volunteer IMPACT Fund project, **Phase II of Wisdom Works: Building Better Communities** looked to build on this work with teams of newly retired adult volunteers by providing them with relevant, high quality trainings addressing organizational and community needs.

Offentimes, organizations distinguish between the training offered to staff and training designed for volunteers. In this case, NCOA identified its workforce, paid and unpaid, and provided a unified and comprehensive learning experience designed to foster authentic engagement, strengthening the capacity of their self-directed volunteer teams to make a difference while reinforcing that volunteers are part of the organization's 'people force.' Both paid staff and volunteers benefited from participating in cutting edge training side by side.

The premise underlying the original Wisdom Works initiative is relevant to all nonprofits. Baby Boomers are redefining retirement – working longer and giving back to the community in ways that are meaningful to them. To be ready to fully tap into what NCOA calls the "asset of age," paid staff and volunteer team members need to receive relevant training that prepares them to harness the potential of 55+ service.

NCOA takes the concept of self-directed volunteer teams, most often associated with paid staff in private industry, and transforms it into authentic civic engagement. They started by organizing volunteer teams mobilized to impact the community with minimal staff intervention. In Phase II, NCOA designed unique leadership development training to fully equip the volunteer teams (and their paid staff colleagues) to get there. Training topics included:

- **Transformational leadership for staff and volunteers together**
- **Peer mentoring performed by stipended volunteers**
- **Concepts of team dynamics and cohesion such as goal setting, strategic planning, managing conflict, negotiating skills, and rewards and recognition**
- **Models of leadership including Hersey & Blanchard situational leadership**
- **Research on empowerment**
- **The characteristics of high performing teams**
- **Strategies for engaging high-level volunteers**
- **Creative and collaborative thinking techniques**
- **Vision sharing to maximize volunteer recruitment, retention and motivation**

NCOA illustrated the efficacy of matching bold new civic engagement opportunities and roles for volunteers with the relevant training to reframe their volunteers' contribution from performing support roles to taking project leadership as empowered teams.

### **Provide instant access to a vast array of VRM training and resources**

**Action Without Borders/Idealist.org** is among the next generation of forward thinking nonprofits to emerge on the domestic and international scene in recent years. Just barely into its second decade, Action Without Borders and its online interactive site, Idealist.org, hold a unique position in the nonprofit space. Central to its vision and mission is the goal of creating 'new spaces, methods, and opportunities for all people to imagine, connect, and act for a better world.' Volunteerism is at the core of the enterprise.

While the primary focus of their IMPACT Fund project was invigorating interest in and transforming perceptions of volunteer resource management as a career, the Idealist experience provides cutting-edge insights that impact Organizational Readiness and Management. The readiness element of Idealist's approach focused on wider or increased access to volunteer resource management best practices, web-based trainings and networking opportunities. Two key elements of Idealist's vision capture the essence of volunteerism and their contribution to VRM readiness:

***Every person who wants to help another has the ability to do so.  
No opportunities for action or collaboration are missed or wasted.***

The Internet was a natural choice as Idealist's vehicle to drive the effort, with extending reach to everyone who wishes to volunteer and those charged with managing volunteers. Action without Borders leveraged their already successful technology platform, the Idealist.org website which receives 850,000+ visits per month/40,000+ hits per hour, to provide 24/7 opportunities for volunteer managers to build their VRM skills and knowledge. The centerpiece is Idealist's comprehensive **online Volunteer Management Resource Center (VMRC)**.

The VMRC is a clearinghouse of the latest research, professional development opportunities for volunteer managers, hundreds of resources, and even a listing of support networks for VRM professionals. It contains material appropriate for a wide range of users – from those who are newly learning about the field of volunteer resource management to seasoned VRM professionals. Many items are sorted by experience level or organization type and size to make it easy to find the most relevant resources. The VMRC is divided into the following sections:

- **What is Volunteer Management** – describes the field and required VRM skills, provides mini-case studies that chronicle the life of a volunteer manager, and illustrates ways VRM can be parlayed into other careers.
- **Best Practices** – provides tools, techniques, models and lessons on the web. It includes standard topics such as recruiting, screening and matching volunteers, to financial management of volunteer programs, volunteer motivation and recognition, developing a volunteer program, and even a section on organizational readiness. One of the most innovative features of the Best Practices section and elsewhere on the site, is the users' ability to rate the resource – click on a star from 1-5 to share what you think of that resource. This enables users to assess which resources are considered most useful by others.
- **Professional Development for Volunteer Management Professionals** – links to online VRM training, accredited courses, degree and certificate programs, as well as event calendars, live conferences and workshops.
- **Volunteer Managers and Human Resource Managers** – illustrates the connections between these two professions and provides access to resources that encourage collaboration between them.
- **Resources** – opens to thousands of items on many VRM-related topics, such as family volunteering, connecting with boomers, gen-Xers and older volunteers; faith-based volunteering, diversity and inclusion; virtual volunteering; and service learning, to name a few. This area of Idealist.org, and everywhere else on the VMRC, provides links to domestic and international partner websites with rich cross-referencing across the Web.
- **Support Networks** - Users can engage in virtual conversations about VRM and search for organizations, networks and resources sorted by location and type. The Personal Connections function allows you to search for VRM mentors or speakers from the AWB Speakers Database, with more than 575 listed for community service and volunteering alone.



It's not just *what* Idealist makes available through the VRMC resource center, it's *how* they did it. To populate and maintain the site, Idealist leverages existing VRM expertise and fosters fresh approaches by calling upon VRM experts around the field. Idealist partners with some of the most respected names in the nonprofit sector and maintains that relationship with an Advisory Board of internationally recognized leaders in the field. Idealist's Advisory Board is a model for capturing world class VRM resources from worldwide sources. As the team at Idealist put it, the VRMC is a "dedicated web space to support, connect, and advocate for volunteer management professionals" – an accessible and effective organizational readiness and management vehicle. Visit <http://www.idealists.org/en/vmrc/index.html> for a look at Idealist's one-stop-shopping VRM resource center.

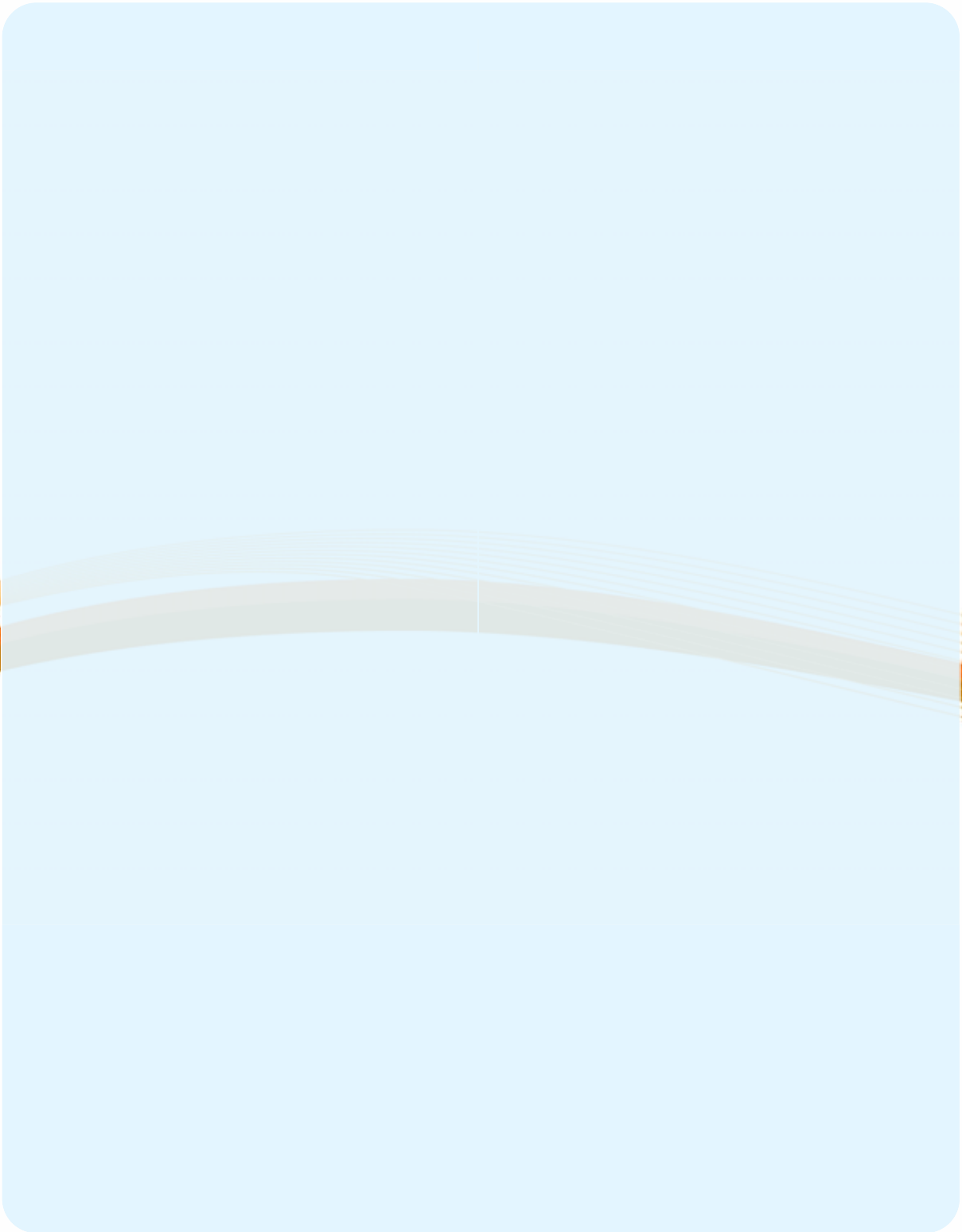
## ORGANIZATIONAL READINESS & MANAGEMENT LESSONS AT-A-GLANCE

	BREAK-IN	BREAK-THROUGH	BREAK-OUT
VRM ASSESSMENT	Assess VRM training and experience levels within your organization using formal surveys or informal information gathering. Determine years of experience and/or whether or not those who work with volunteers have received VRM training	Determine partner organizations' VRM expertise through networking, focus groups and/or surveys	Working together with others to conduct periodic community-wide VRM assessment (surveys, focus groups, meetings with organizations) that results in a plan for building VRM capacity across organizations
CURRICULUM DEVELOPMENT	Tap into an existing VRM curriculum and offer training to internal volunteer managers	Develop your own curriculum based on the needs of your organization and others with whom you work and offer it internally and to organizations with whom you work closely	Engage subject matter experts and partner organizations to collaborate in curriculum development  Engage experienced experts as members of an ongoing curriculum advisory group

	BREAK-IN	BREAK-THROUGH	BREAK-OUT
EXTENDING REACH/VRM TRAINING DELIVERY	<p>Provide VRM training within your organization for those who work directly with volunteers as well as others who benefit from awareness of VRM principles and practices</p>	<p>Extend VRM training opportunities to strategic external partners including nonprofits and other community groups</p>	<p>Enhance or develop strategic partnerships with an eye towards pooling VRM resources and training opportunities</p> <p>Provide various methods to access VRM training including leveraging your and/or partners' web presence</p> <p>Seek modest funding to provide incentives for VRM training participants such as scholarships to cover training fees.</p>

Visit [www.volunteerinnovation.org](http://www.volunteerinnovation.org) for more information about Volunteer IMPACT Fund grantees and for an opportunity for you to share your own volunteer resource management wisdom.

NOTES:





The Center for Volunteer Innovation  
An Initiative of the National Human Services Assembly  
[www.volunteerinnovation.org](http://www.volunteerinnovation.org)

