The Complete Volunteer Management Handbook

3rd edition

Steve McCurley, Rick Lynch
and Rob Jackson

DSC

In association with : volunteering england

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DIRECTORY OF SOCIAL CHANGE

volunteering england

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Steve McCurley is an internationally known trainer and speaker in the field of effective volunteer involvement. He is currently a partner in VM Systems, a management consulting firm which specialises in helping organisations to improve their utilisation of volunteers.

He has served as a consultant on volunteer programme development for the American Association of Retired Persons, the National Association of Partners in Education, the US Tennis Association, Special Olympics International, the National Park Service, the Points of Light Foundation and other groups. He has served on the national board of Women in Community Service, the Association for Volunteer Administration, the board of the Volunteer Center of Olympia, WA, and the Advisory Board for the Virtual Volunteering Project of the University of Texas. He is the co-founder with Susan Ellis of the *e-Volunteerism* online journal. He is the author of 16 books and more than 200 articles on volunteer involvement, including the global bestselling basic text, *Volunteer Management*.

While primarily based in the US, in the UK Steve has worked with Community Service Volunteers, Volunteering England, the British Red Cross, the National Trust, Guide Dogs for the Blind, TearFund and many other groups. He was one of the founding faculty members of the Institute on Advanced Volunteer Management, formerly held in the UK each year. For the past 15 years he has provided training to hundreds of volunteer managers throughout the UK.

On the international front, Steve has worked in Canada, Ireland, Germany, the Caribbean, Australia and South America. His works on volunteer involvement have been translated into Spanish, Portuguese, Russian, Ukrainian, Hebrew, Chinese and Korean, among other languages.

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Rick Lynch is a Seattle-based management consultant with a variety of clients in the US, Canada, the UK, Ireland, Australia, Singapore, Russia and Brazil. He is the Principal Consultant of Lynch Associates, a consulting firm whose mission is to help organisations to create productive work environments. His consulting work involves projects on subjects such as:

- streamlining work flow;
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- developing customer-responsive organisational systems;
- strengthening boards and management committees;
- redesigning work;
- assessing the motivational 'health' of organisations.

Each year, Rick speaks at approximately 100 workshops, conventions and conferences in North America, Australia, Asia and Europe on topics related to personal growth and management effectiveness. He is the author of the books *Precision Management* and *Getting Out of Your Own Way*, and of a monograph entitled 'Developing Your Leadership Potential'. *Lead*, his book on leadership was published by Jossey-Bass in January 1993. He is the co-author of the book *Keeping Volunteers*.

Before starting his own firm in 1977, Rick worked for five years as a project director and senior trainer for three management consulting firms in New York and Washington, DC. He holds a master's degree from the University of Iowa.

Rick's experience in the field of volunteer management includes work as a volunteer coordinator and as the training director for the Washington State Office of Voluntary Action, where he set up a unique system of delivering management training to volunteer directors through a network of volunteer training organisers. He has served on the boards of directors of nine non-profit organisations, including a volunteer centre, a retired senior volunteer programme, a United Way and national and local literacy programmes. He has been a featured speaker on volunteer management at national, international and state conferences since 1979.

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Rob Jackson has worked in the volunteering movement since July 1994. In this time he has led and managed volunteers and volunteer programmes in the areas of education, advice, fundraising and children's services at local, regional and national levels.

In April 2005, Rob joined Volunteering England (www.volunteering.org.uk). During his six years there, most of which he spent as Director of Development and Innovation, Rob successfully generated over £1 million of income, led a merger with Student Volunteering England and oversaw the delivery of a number of strategic development projects in the volunteering field. Rob also provided the secretariat to the groundbreaking Volunteer Rights Inquiry.

Rob has strong links with the fundraising world, including a period working as Head of Fundraising Strategy for the Royal National Institute of the Blind (RNIB) and chairing the Institute of Fundraising working party that developed the UK's first code of good practice on volunteer fundraising.

Rob now runs his own business, Rob Jackson Consulting Ltd (www.robjacksonconsulting.com), which provides consultancy and training services on a range of topics, with volunteerism remaining at the core of his work.

Rob writes, speaks and trains management internationally and is an active volunteer, serving as a chair of governors at his sons' school, founder and moderator of UKVPMs (the first email networking resource for UK-based volunteer programme managers: groups.yahoo.com/group/UKVPMs), and as a member of the editorial team for *e-Volunteerism*, an international journal on volunteering issues (www.e-volunteerism.com).

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About the Directory of Social Change

DSC has a vision of an independent voluntary sector at the heart of social change. The activities of independent charities, voluntary organisations and community groups are fundamental to achieve social change. We exist to help these organisations and the people who support them to achieve their goals.

We do this by:

- providing practical tools that organisations and activists need, including online and printed publications, training courses, and conferences on a huge range of topics
- acting as a 'concerned citizen' in public policy debates, often on behalf of smaller charities, voluntary organisations and community groups
- leading campaigns and stimulating debate on key policy issues that affect those groups
- carrying out research and providing information to influence policymakers.

DSC is the leading provider of information and training for the voluntary sector and publishes an extensive range of guides and handbooks covering subjects such as fundraising, management, communication, finance and law. We have a range of subscription-based websites containing a wealth of information on funding from trusts, companies and government sources. We run more than 300 training courses each year, including bespoke in-house training provided at the client's location. DSC conferences, many of which run on an annual basis, include the Charity Management Conference, the Charity Accountants' Conference and the Charity Law Conference. DSC's major annual event is Charityfair, which provides low-cost training on a wide variety of subjects.

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Foreword

To improve how we manage volunteers is an ever more important activity, as the policy environment and our own commitments mean that we look to involve greater numbers of people in volunteering on reduced resources. It is not only that we are asked to do more for less, but also that we know how crucial it is that volunteers feel their time has been well-organised if they are to continue volunteering.

In reviewing how we manage volunteers, we have to consider what is appropriate for our very different organisations, with their particular missions, cultures and capacities. Managing volunteers in a small community group compared with, say, a large public-service organisation or a campaigning national charity raises some common issues and some different problems and solutions.

In facing up to these challenges, we need to draw on the body of knowledge that has been built up through experience and research over the years and from around the world – this new edition enables us to do just that.

This book, which has been recognised as essential reading for years, offers wisdom from tried-and-tested practice and from professional expertise. It sets out pioneering research findings and provocative ideas. It recognises the complexities and the necessity of reviewing alternatives and suggests models which can help us to work out what to do in everyday organisational life. It doesn't offer a quick fix or three steps to heaven, but it does give us frameworks and expert knowledge to help us come to well-founded decisions about our actions as volunteer managers.

The book has a great advantage, too, in that its authors have lived and worked with these problems over time. That they are ready to share their knowledge and contribute to strengthening the volunteering movement is very much to be welcomed.

Dr Justin Davis Smith CBE
Chief Executive, Volunteering England

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Chapter 13: 'Building volunteer and staff relationships'

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Chapter 16: 'Special topics in volunteer management'

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1 An introduction to volunteer involvement

ON VOLUNTEERS AND VOLUNTEERING

This is a book about volunteering and about how organisations can make use of the time and talents of volunteers. In it you will find statistics and examples of programme practices from all over the world. This is highly intentional, and reflective of the fact that formal volunteering is now an international activity. Examples and data are used from a wide spectrum both to illustrate different perspectives and to demonstrate that since the basic operating component of a volunteer programme is 'people', we can learn a lot from the experiences of those in other countries. Furthermore, these statistics and examples are intended to be used as evidence and ammunition for volunteer programme managers in arguing the case for the value of volunteers with their own organisations, and the need to put adequate resources into the operation of the volunteer programme. If you would like to focus only on statistics involving the UK see the 2007 survey, *Helping Out: A National Survey of Volunteering and Charitable Giving*, and Communities and Local Government's *Citizenship Surveys,* which are quoted from frequently.

Let's start by defining what is meant when we talk about 'volunteers'. This may seem obvious, especially to those of you who are managing volunteer programmes in organisations, but it is an aspect of volunteering that has many murky areas.

Consider these examples. A person who, without financial compensation, cares for patients under the supervision of a volunteer programme manager in a hospice is obviously a volunteer. What if the person carries out the same activities for a neighbour, unconnected to a charity? What if the neighbour is the person's mother? What if the person's activities at the hospice were undertaken in order to keep receiving their jobseeker's allowance?

While it may seem that quibbling about the definition is simply an intellectual exercise, it does affect the statistics about how many people volunteer. Many people who do voluntary work don't consider themselves to be volunteers (youth sport coaches, for example) and may not answer 'yes' to the question, 'Did you do any volunteer work during the past year?'

In recent years even the word 'volunteer' has been viewed with suspicion and numerous attempts have been made to find an acceptable replacement. A few years ago in the UK a mercifully brief attempt was made to substitute the word 'favour' for 'volunteering'. Good people did 'favours' for their neighbours. A more traditional definition was used in the *Helping Out* survey: 'individuals who spend time, unpaid, doing something that benefits the environment or individuals or groups other than (or in addition to) close relatives' (Low et al. 2007).

In the US, at the time of writing, the notion of 'service' is in vogue as an alternative to 'volunteering'.

This book uses a definition for volunteering that was developed by Ivan Scheier (1980), who invented most of what we today call volunteer management:

A planetary definition of volunteering:

1. *The activity is relatively uncoerced.*
2. *The activity is intended to help.*
3. *The activity is done without primary or immediate thought of financial gain.*
4. *The activity is work, not play.*

Within that definition we will encounter wide varieties of community engagement with organisations, ranging from the purely altruistic to the directly selfish.

NOTES ON TERMINOLOGY

First is a note regarding the concept that what volunteers do is 'work'. The book frequently refers to volunteers doing work and being given volunteer jobs. While it is understood that some feel uncomfortable with the use of these terms because they associate the words 'work' and 'job' with employment, this book does not subscribe to such a view.

'Job' is a term used to describe a piece of work, but isn't uniquely used in employment. To do a job means to do a piece of work at a stated rate. In volunteering terms, this stated rate is zero. Consider that we all do jobs around the house, yet we don't get paid and are not employed to do so.

One stated reason for steering clear of the word 'job' is because doing so means that it reduces the risks associated with volunteers having employment status. This is misguided. No volunteer has ever been found to be an employee simply because the work that they did was described as a job. The steps to avoid volunteers being seen as employees are more complex and involved than changing the word that you use to describe what they do.

Similarly, if you avoid the word 'job' then where do you draw the line? Do you say that volunteers can't have responsibilities, do work or perform tasks – all terms used when talking about employees?

In the authors' view, avoidance of the word 'job' with regard to volunteers is driven by an anxiety disproportionate to the risk, and makes a change that has negligible consequences in terms of employment law. This book, therefore, discusses volunteer work and volunteer jobs but, if that is not your preference, please feel free to replace those words with something you prefer. In addition to 'work' or 'job' we will also refer to what volunteers do in a number of ways including: position, role, task, assignment and responsibility. All of these may simply be taken as referring to the work done by the volunteer.

Second, 'volunteer programme manager' is the term used in this book for those who have responsibility within an organisation for leading and managing volunteer efforts. The term indicates an individual who takes responsibility for directing the overall programme of volunteer involvement, not just for the individual volunteers. Volunteer programme managers are also known as volunteer coordinators or directors of volunteers. When a 'supervisor' is referred to, however, this can signify the volunteer programme manager or a member of staff who is assigned to work directly with a volunteer.

And third, there are many ways to describe the sector and the organisations within it – voluntary, non-profit, charitable, the third sector, civil society, etc. – and there are differences in what constitutes the sector from one term to the next. This book, for the most part, avoids references to any particular designation and, as such, simply uses 'organisation' as a broad umbrella term and 'non-profit organisations' or the 'non-profit sector' where necessary.

The book's perspective

This book is written mainly from the perspective of a formal volunteer programme within an organised structure. Those of you in less formal structures, and those of you in much smaller organisations, will quickly note that many of the recommendations are probably more intensive than you either need or can implement. This is intentional – the idea is that it is easier for you to discard items that are beyond your needs rather than have to invent them on your own.

The remainder of this first chapter will show you the incredible range, variety and potential of community involvement.

AN OVERVIEW OF VOLUNTEER ACTIVITY FROM VARIOUS STUDIES

The UK's *Citizenship Survey: 2010–2011*, which was based on interviews with 15,870 aged 16 or over, found that:

- 39% of adults had volunteered formally (defined as giving unpaid help through groups, clubs or organisations to benefit other people or the environment) at least once in the previous 12 months;
- 25% of adults had volunteered formally at least once a month;
- those aged 65 to 74 years were most likely to participate in formal volunteering at least once a month (31%);
- the lowest level of formal volunteering at least once a month was in the 26 to 34 age group;
- there was not much variation between men's and women's levels of formal volunteering at least once a year (39% and 38% respectively).

Communities and Local Government 2011

In Canada, representative samples of Canadians aged 15 and older from two surveys in 2007 were combined (20,510 Canadians living in one of the ten Canadian provinces and 1,317 Canadians living in one of the three Canadian territories). The results of the combined surveys showed that:

- 46% of the population volunteered their time to charities or other non-profit organisations;
- the average number of hours volunteered was 168;
- the highest rate of volunteering was found among young Canadians – 58% of 15- to 24-year-olds volunteered;
- the highest average hours of volunteering were among seniors – those 65 and over volunteered 218 average annual hours
- women were more likely than men to volunteer (49.7% versus 43%), but men's average annual hours were 203 as opposed to 155 for women;
- half of those volunteering did so for one organisation during the course of the year, 28% volunteered for two organisations, and the remaining 22% volunteered for three or more organisations – 77% of total hours went to the organisation for which the volunteer contributed the most time.

Statistics Canada 2009

A US study based on a sample of 60,000 households of those aged 16 or over found that:

- 64.3 million people – 28.64% of the population – volunteered for an organisation between September 2010 and September 2011;
- volunteers spent 51 median annual hours on volunteer activities. Median annual hours spent on volunteer activities ranged from a high of 96 hours for volunteers aged 65 and over to a low of 32 hours for 25- to 34-year-olds;