

The Complete **Volunteer Management** Handbook

4th edition

Rob Jackson, Mike Locke,
Dr Eddy Hogg and Rick Lynch



‘The Complete Volunteer Management Handbook is an excellent resource for volunteer managers. Through its clear and practical advice, even more volunteers will be supported, creating an even greater impact for our communities.’

Jenny Betteridge, Strategic Lead Volunteering, Sport England

‘Having worked for more than 30 years in the volunteer management space, I highly recommend this book. It provides a comprehensive and clearly written pathway for the running of any successful program. Most importantly, it recognises the complexities of volunteer leadership in the 21st century and deals with issues far beyond the usual suspects of recognition, reward and recruitment.’

Andy Fryar, Better Impact Pty Ltd, Australia

‘This is a hugely comprehensive book that I would recommend not only to people involved in managing volunteers, but also to public sector leaders and policy makers so they can consider the benefits of volunteers to their services. This book reminds us that volunteers offer more than their time and skills, the gift they are offering is personal contact, human experience and the simple intent to make someone else’s day better – and that goes a long way to making life better for all involved. To maximise the value of volunteering requires good quality management, and this handbook sets the bar rightly high.’

Paddy Hanrahan, Managing Director, HelpForce

‘This book is a really practical starting point for people looking to involve volunteers. It covers the range of issues likely to come up in a readable, approachable way.’

Denise Hayward, Chief Executive Officer, Volunteer Now

‘A valuable source of information for anyone seeking to empower and support volunteers through effective management, enablement and support. The book is well researched, clearly presented and easy to navigate quickly.’

Rebecca Kennelly, Director of Volunteering for Royal Voluntary Service

‘A no-nonsense guide to involving people who give their time. This book goes beyond the basics by including chapters on specific challenges. It offers both practical pointers and research-based perspectives on the topic for those who want to explore a little more.’

Ruth Leonard, Chair of Association of Volunteer Managers and Head of Volunteering Development, Macmillan Cancer Support

‘There is a Greek proverb that says, “a civilisation flourishes when people plant trees under which they will never sit”. If you need a roadmap and guide on your journey in helping people plant those metaphorical trees through donating their time and talents to your cause – then this is the book you need to read. It’s packed full of expert advice and handy hints and tips to help you get your volunteer management right for your organisation and perhaps most importantly your volunteers.’

Alan Murray, Head of Volunteering and Employee Engagement, RSPB

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This book is dedicated to Susan J. Ellis, founder and President of
Energize Inc., Philadelphia, USA.

For more than forty years Susan provided leadership and inspiration
to leaders of volunteer engagement around the world.

Susan's impact on volunteer management was huge. Without her,
volunteer management wouldn't be what it is today.

Susan J. Ellis

18 March 1948 to 24 February 2019

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He is co-author of *The Complete Volunteer Management Handbook*, first published in the UK in 1994 by DSC as *Essential Volunteer Management*, and *Keeping Volunteers*.

About the Directory of Social Change

The Directory of Social Change (DSC) has a vision of an independent voluntary sector at the heart of social change. We believe that the activities of independent charities, voluntary organisations and community groups are fundamental to achieve social change. We exist to support these organisations in achieving 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, as well as offering bespoke research for the voluntary sector.

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. Our subscription website, Funds Online (www.fundsonline.org.uk), contains a wealth of information on funding from grant-making charities, 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 and fairs, which take place throughout the year, also provide training on a wide range of topics and offer welcome opportunities for networking.

For details of all our activities, and to order publications and book courses, go to www.dsc.org.uk, call 020 7697 4200 or email cs@dsc.org.uk.

Foreword from the University of Kent

Volunteers play a crucial role in a wide range of organisations, from health care to sport and from care for the elderly to education. How these volunteers are managed is fundamental to this role, as volunteers must feel that their time has been well organised and that they are equipped to make a difference. At the University of Kent, we are proud that our research is used in practical ways, such as this book, to contribute to the establishing and sharing of best practice. It is central to our role as academics that we address not just theoretical questions but also practical solutions; through the partnership of academic knowledge and practitioner experience, this book does that for the vital task of volunteer management.

Professor Karen Cox, Vice-Chancellor, University of Kent

Foreword

Volunteering is integral to the way British society functions, and there is no doubt that volunteering is a huge benefit both to the individuals who partake of it and to the wider community. There are few people who have not been touched by volunteering at some time in their lives, whether as a giver or receiver. They may not have even realised they were volunteering with a capital ‘V’, or indeed, on the other side of the coin, that they benefitted from the help of volunteers.

People choose to volunteer for a variety of reasons, in a large part because they know that they are helping others, but also because they gain valuable experience and enjoyment from the process. As a retired athlete I well and truly understand the importance that volunteering had on my own sporting career. The majority of my coaches were volunteers. In addition to the attention they gave to individual athletes within the clubs like myself, they also gave up significant amounts of time to attend coaching courses and further develop their own skills. I have fond and grateful memories of those who were there in the wind, rain and sometimes sunshine who believed in me and the other athletes with whom I trained. They sought to bring out the best in me.

In an evolving society where there is competition for people’s time there are many routes to becoming a volunteer. My first job on graduating was to support a group of volunteers in a sports programme. What I learnt from that role undoubtedly helped develop my own skills, challenged me constantly, and that know-how I use every single day.

Individuals need to be inspired with volunteer opportunities that connect with them. It is also important that their contribution is recognised, valued and supported. To do that well, requires aptitude, thoughtfulness and an understanding of what and why people want to contribute. They are a set of attributes that can only be acquired through hard work and dedicated personal development.

This book provides extensive guidance on effective volunteer management, matching people to the right roles and creating an effective volunteering strategy. It is a valuable resource for everyone who works in this hugely significant aspect of our lives.



Baroness Grey-Thompson, DBE, DL

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Chapter 1: An introduction to volunteer involvement

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Chapter 2: Planning for high-impact volunteer involvement

East Anglia's Children's Hospices, Football Beyond Borders and Samaritans for permission to quote from mission statements on their websites.

Chapter 3: Embedding volunteer involvement

Blue Cross for a case study.

The Institute for Volunteering Research for permission to quote from Angela Ellis Paine and Justin Davis Smith, *Exhibiting Support: Developing volunteering in museums* (also chapter 5)

Chapter 5: Recruiting volunteers

British Red Cross for top tips on writing a convincing volunteer message.

Chapter 8: Managing and empowering volunteers

Jossey-Bass for permission to quote from James Kouzes and Barry Posner, *The Leadership Challenge*.

Chapter 13: Building and maintaining relationships with volunteers

United Parcel Service Foundation for permission to quote from *Managing Volunteers: A report from United Parcel Service*.

Chapter 14: Building staff and volunteer engagement

Energize Inc. for permission to quote from the blog post *Start early: Teaching students about volunteering, not simply doing it*.

Preface to the fourth edition

This book, now in its fourth edition, is a practical guide to the profession of volunteer management. There are thousands of books on various aspects of managing paid staff, but managing volunteers is fundamentally different from managing paid people. Although there are some similarities, these areas differ dramatically in other respects. People who try to manage volunteers as though they are the same as paid staff will not do well in retaining or getting the most out of their volunteers in today's world.

Volunteer management is a very young profession, but it is a profession nonetheless. This book explores the major functions of the manager of volunteers, the person with overall responsibility for volunteer engagement in an organisation, and all those who manage volunteers in an organisation. Although it has a focus on how that role is practised in the UK, the principles apply to other countries as well, and previous editions of this book have been translated into four languages.

The first edition of this book was based on *Volunteer Management*, published in the USA by Steve McCurley and Rick Lynch. Although Steve has regrettably retired, much of the content of this book is based on his unique and, frankly, brilliant insights into the nature of volunteer engagement. Without his contributions, the profession would be vastly less effective.

The book begins with an overview of the profession. It then has chapters exploring various skills that managers of volunteers need in order to play their role effectively: skills in planning, role design, recruitment, screening and interviewing, training, supervision, motivation, consultation and evaluation.

Each chapter can be used as a stand-alone document, guiding the manager of volunteers on specific aspects of the role. There is, however, a logic to the arrangement of the chapters. Planning leads to role design, which leads to recruitment, which leads to interviewing and placement, which leads to training, which leads to supervisory and motivational concerns.

The chapter on planning (chapter 2) introduces the concept of strategic volunteer management. For too long, non-profit organisations have had a scarcity mentality. They are always lamenting their inadequate funding, chafing at the limits of their financial resources. By involving volunteers in non-traditional,

mission-critical roles, as described in this book, non-profits can overcome their financial constraints.

There are a variety of trends, discussed in this book, that have been in play for quite some time but have now reached a point where they can no longer be ignored. For a long time, we have managed volunteers as though they were paid employees, often confining them to useful, ancillary functions. This ‘human resources model’ still works with people who volunteer as an alternative to working for pay. But most people today volunteer as an alternative to other uses of their leisure time. Engaging them and keeping them engaged requires a different approach.

The main thing to keep in mind is that volunteering is voluntary, which means people will give you their time to do what they *want* to do. Employees will do lots of things they don’t want to do, but volunteers increasingly will not.

The chapter on role design (chapter 4) introduces the reader to the concept of designing roles for volunteers that are as appealing as other uses of their leisure time. We need to make sure the volunteer is doing something that they want to do. Part of that is about matching a volunteer’s motivations to the work that needs to be done, but part of it is also about designing the role so that it has some of the same motivational characteristics as leisure-time activities. The volunteer’s role should not feel like a job, in the traditional sense.

The principle of making sure volunteers are doing something they want to do also underlies a key difference in recruitment. When we recruit people to work in a paid position, we may try to convince them that we are the right organisation for them to join. When it comes to volunteers, recruiting is about showing people that they can do something they already want to do.

Non-profit organisations exist to solve community problems or meet community needs. In every community, there are people of goodwill who care deeply about those problems or needs, but often feel helpless to do anything about them. Recruiting is about letting those people know that there are opportunities to help solve those problems or meet those needs.

Nowhere is the difference between managing paid and volunteer staff more evident than in the function of interviewing and screening. When we interview people for a paid position, we appropriately focus on finding someone who most closely matches the skills, knowledge and attitudes we need; we try to find the right person for the job. When we interview volunteers, our primary focus is on finding the right job for the person. The chapter on interviewing and screening (chapter 6) points out that this ‘right job’ may be one we hadn’t previously imagined anyone doing.

The principle of making sure volunteers are doing what they want to do also applies to supervision. While new volunteers appreciate being told what to do, that approach tends to breed resentment over time. In the chapters on management, we lay out a strategy whereby the volunteer's manager or supervisor can allow volunteers to control their own actions while ensuring that the volunteer does the right thing (see chapters 8–13).

The thing that makes volunteer management tricky is that what a volunteer wants to do may change over time. Part of the task of the manager of volunteers is to keep in regular contact with volunteers and see whether they would be more satisfied by doing something other than their current role.

In the UK, managers of volunteers have become quite sophisticated in their volunteer engagement strategies in recent years. In larger organisations where volunteers are supervised by other staff, that knowledge must be shared with those staff. This implies a new role for the manager of volunteers, one in which they act as a coach and an internal consultant to other staff to help them do a good job of applying the principles contained in this book.

This changing role of the manager of volunteers is one of the topics covered in the chapter on building staff and volunteer engagement (chapter 14). This chapter addresses the concerns staff might have about volunteers having significant responsibility and offers a strategy for allaying those concerns. The chapter contains several practical tips for getting staff on board.

Volunteers do not work for money, but they do receive a 'motivational pay cheque'. They are rewarded by satisfaction of their motivational needs. This theme, which runs throughout the book, is expanded upon in the chapters on supervision and retention (particularly chapter 13).

When paid people are managed in demotivating ways, they will still come to work, at least until they find other employment. Volunteers, increasingly, will not. In the chapter on building and maintaining relationships with volunteers (chapter 13), we offer practical advice on creating a volunteer experience that builds the volunteer's self-esteem and may even make their volunteer role the best part of their life.

This book also contains a chapter on measuring volunteer impact (chapter 15). Traditionally, when non-profits have been asked to put a financial value on their volunteer programme, the response has simply been to multiply the number of volunteer hours spent by how much it would cost to pay a person. In this chapter, we present a method for measuring the value of the difference volunteers make in adding value to an organisation.

The fact that this book is in its fourth edition is a testament to its continued relevance and value to managers of volunteers. The addition of two new authors (both leading academics working on volunteering and non-profits), alongside a leading expert in volunteer management practice, means that this is the most complete and up-to-date version of the world's best-selling book on volunteer engagement, and it will continue to be a go-to resource for leaders and managers working with volunteers for years to come.

Rick Lynch
September 2019

1 An introduction to volunteer involvement

This is a book about volunteering, volunteer management and how organisations can make the most of the time and talents of volunteers. In it you will find advice, evidence and examples of practices from the UK and beyond. This advice, supported by experience, statistics and examples of best practice, will help anyone who manages volunteers, or has strategic responsibility for managing them, to make the case for volunteering within their own organisation and to establish the need to put adequate resources into the engagement of volunteers.

This chapter will first establish our approach in writing this book, what we are aiming to do, and how we approach volunteering and volunteer management. Next it gives a brief overview of volunteering in the UK, including trends and changes in volunteer engagement and management. We review the language and terminology used around volunteering and managing volunteers, and we consider reasons for volunteering and how the volunteering population is changing.

1.1 OUR APPROACH: VOLUNTEER MANAGEMENT IN THE 2020s

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 than to have to invent them on your own.

Our goal is that anyone who has responsibility for volunteers in their organisation should be able to pick up this book and learn the essentials needed for successful volunteer involvement. Some may choose to read the book from cover to cover while others may want to dip in and out as needed. It is our aim that, regardless of how you use this book, it will become your go-to source on all things related to engaging volunteers and ensuring that they can be as effective as possible for your organisation.

Before we begin to explore volunteer management and the key topics that those who manage volunteers should consider, it is first necessary to be clear what it is that we are talking about.

What is volunteering?

If we are to talk about volunteering and volunteer management, we need to start by defining what is meant when we talk about ‘volunteers’. This may seem obvious, especially to those of you who are managing volunteering in an organisation. However, it is an area that can lead us into knotty debates, which, if unresolved, may distract us from tackling the problems that face us.

Consider these examples. A person who, without financial compensation, cares for patients under the supervision of a manager of volunteers in a hospice is obviously a volunteer. But what if the person carries out the same activities for a neighbour, unconnected to a hospice? What if the neighbour is the person’s mother? What if the person undertakes these activities at the hospice in order to keep receiving their state benefits or allowances?

While it may seem that quibbling about the definition is simply an intellectual exercise, the definition that is chosen affects statistics about how many people volunteer and has an impact on how these people might need to be managed. Many people who do voluntary work don’t consider themselves to be volunteers (sports coaches, for example) and may not answer ‘yes’ when asked whether they volunteer. Therefore, different positions on such definitions may also affect how people are treated by managers and through policy, and whether members of the public are prepared to put themselves forward to do the work.

There is no universal definition of volunteering. The UK legal system does not provide an overall definition of volunteering, but some legislation and regulations define volunteering – in slightly different ways – for their specific purposes. Following a comprehensive review of both academic literature and policy documents, Eddy Hogg provided a broad definition of volunteering as ‘any act that involves giving time and effort, for no financial payment, of free will, to provide for those beyond one’s own close family’.¹

This definition is inclusive of both formal volunteering – undertaken with an organisation – and informal volunteering – undertaken without an organisational structure. Therefore, for the purposes of this book, we need to add a further element to our definition of volunteering: that it takes place through an organisation where it needs to be, to various extents, managed.

It should also be noted that numerous attempts have been made to find an acceptable alternative to the word ‘volunteer’, without success. In the UK and the USA, at the time of writing, the notion of ‘service’ is in vogue as an alternative to ‘volunteering’. The notion and associated language of ‘social action’ have also become popular among policymakers and some organisations that seek to encourage and support youth volunteering.

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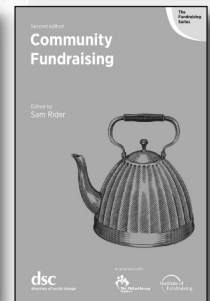
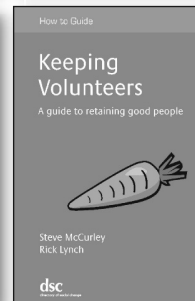
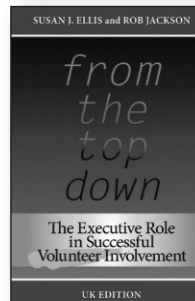
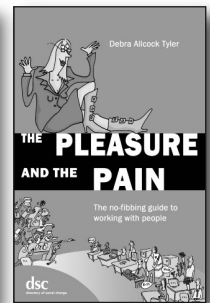
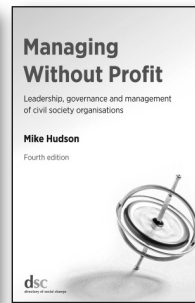
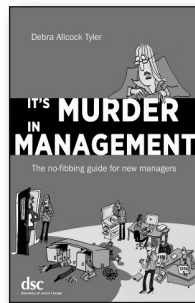
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