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SUSAN J. ELLIS and ROB JACKSON

*from
the
top
down*

The Executive Role
in Successful
Volunteer Involvement

UK EDITION

FROM THE TOP DOWN

from the top down

THE EXECUTIVE ROLE
IN SUCCESSFUL VOLUNTEER
INVOLVEMENT

Susan J. Ellis and Rob Jackson

UK Edition

ENERG!ZE^U

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This book is dedicated to John Ramsey, who, sadly, died during its production. John was one of the leading lights of the UK volunteer management field and was instrumental in founding and establishing the Association of Volunteer Managers.

In a previous professional life, John was a solicitor and therefore the ideal choice when we needed a new UK chapter on legal issues and volunteering. His writing here is the last work of his to be published.

John's passion and commitment to volunteering were an inspiration to many. His speaking and writing simultaneously challenged and inspired. With the loss of John, we lose one of the shining stars of our field.

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Preface

Susan wrote the first edition of *From the Top Down* in 1986. Revisiting it ten years later for the second edition, she was struck by the continued relevance of the words she had chosen so carefully a decade previously. We are now firmly into the new century, and the continuing relevance of most of the material in this book is both comforting and disturbing. Of course, much has changed both in the world and in volunteerism, which is why she produced an updated third edition in 2010. But the basic *rationale* for executive involvement in successful volunteer engagement is as clear and constant as ever.

From the start, *From the Top Down* was well received in the UK, as elsewhere around the world. It was distributed by Volunteering England and Amazon.co.uk. But it was always incomplete for the British reader because the chapters on finances and legal issues were specific to the American audience. We are therefore delighted to produce this new, UK edition through the expert guidance of Rob Jackson and the team of in-country professional consultants he has recruited.

In fact, the profession of volunteer management has made great strides in training leaders of volunteer involvement. The number of books on how to work effectively with volunteers has more than quadrupled since the first books of the 1970s. Volunteerism conferences attract several thousand at the international or national level and hundreds at the state or provincial level in the United States and elsewhere in the world. It is increasingly possible for someone to learn about volunteer programme development and management at the local level through regular workshops and even to obtain some type of certificate. And, of course, the Web has brought an inconceivable wealth of materials to everyone's fingertips and has made international professional exchange a daily occurrence.

Most books and articles about involving volunteers are designed for the person designated to implement an organisation's volunteer resources strategy and who has direct contact with volunteers on a daily basis. Such front-line managers are the usual audience in the training workshops

both of our companies offer. Our workshops (as well as our individualised consultations) deal with all aspects of how to start, maintain, or expand the engagement of volunteers in organisations that range from hospitals to courts, from museums to schools. The skills of volunteer administration are generic and apply to all settings. They are also amazingly universal. We have presented sessions in twenty-six countries on six continents; the context varies from culture to culture, but the principles always apply.

However, not much progress has been made in training senior managers and other staff who interface daily with volunteers but who do not carry major responsibility for the organisation's overall volunteer involvement strategy. That's the gap this book tries to fill.

The great news is that today, *From the Top Down* has company in two important new companion publications:

- Sarah Jane Rehnborg's *Strategic Volunteer Engagement: A Guide for Non-profit and Public Sector Leaders* distils research conducted through the University of Texas at Austin with actual executives of agencies to make a very strong case for investing in volunteer effectiveness. We quote from this report throughout the book.
- Betty Stallings has created a unique resource, *Leading the Way to Successful Volunteer Involvement: Practical Tips for Busy Executives*. It offers guides, worksheets, checklists, and templates specifically selected or created to assist readers of *From the Top Down* in putting the recommendations here to work.

Susan

There is no way I can thank all the many colleagues who have expanded my knowledge of volunteer involvement over the last three decades, but their collective influence is reflected in these pages—as are anecdotes and examples they have shared publicly and individually.

Special and huge amounts of gratitude go to the people who reviewed this manuscript at various stages and generously offered solid feedback, worthwhile critiques, and additional content: Betty Stallings, Colleen Kelly, Sarah Jane Rehnborg, Linda Graff, Jeff Kahn, Janine Bovatsek, and Keith Skillman. You are all wonderful! This group represents the United States and Canada, and I also appreciate the constant support from Rob Jackson in England and Andy Fryar in Australia. We are truly an international field,

and I hope readers from around the globe will recognise the universality of much of what I try to convey in this book.

Now, I am thrilled to be launching the first UK edition of *From the Top Down* and cannot express enough thanks to Rob for his hard and devoted work on this book. It's been delightful to watch him develop in this profession over the last twenty years and to welcome him to the ranks as an international consultant and author!

Finally, my sincerest gratitude to Cara Thenot, director of online publishing at my company, Energize, Inc., for her unflagging commitment to helping me produce the highest-quality publication, on schedule and still in my right mind.

Rob

I have to start by thanking Susan. Her guidance, support, encouragement, and friendship over many years mean so much to me personally and professionally. I am very grateful to Susan for giving me the opportunity to work on this book with her.

I want to thank Steve McCurley, Rick Lynch, Linda Graff, Arlene Schindler, Andy Fryar, Martin J Cowling, Jayne Cravens, Fraser Dyer, Betty Stallings, and the much-missed Mary Merrill for their years of support and encouragement.

A big thank you to the team at Energize, Inc., for supporting the production of this book and for lifting the curtain on the publishing world for me.

Thank you to my wonderful partner, Angela; my children, Sam and Daniel; and my stepchildren, Alice and Laura, for your support and for always keeping me grounded.

Introduction

Needed: Executive Attention

Picture the following:

Two dutiful volunteers assemble patient-information kits at a card table in the outpatient waiting room of a just-renovated hospital. When asked about the temporary-looking workspace, they explain that their prior workspace had been eliminated from the new floor plan without anyone noticing.

Two snow-covered volunteers brave a major blizzard to come in to meet with their assigned clients, only to find that the agency was closed because of the weather conditions and that only the paid staff had been notified.

Surprised museum volunteers are displaced after ten years of service when the institution hires a part-time information desk staff member and then asks those volunteers to train the new hire and to keep the desk staffed during other hours—all without prior notice or discussion.

Actively engaged civic association members are stopped in their tracks after their national board eliminates the local clubs' favourite, well-established service project because a new lawyer felt it had too much risk potential, even though there had not been a single lawsuit in fifteen years.

The common problem in all these real-life scenarios is that no one was envisioning volunteers when making decisions. Each organisation in which these situations took place considers itself welcoming to volunteers, and its chief executive speaks of community involvement in glowing terms. But in day-to-day practice, the volunteers were, in effect, *invisible*, limited from contributing their full range of talents because they were not seen as important to the organisation's mission-driven work and were not integrated into the *full scope* of strategic planning.

Too many volunteer involvement efforts suffer from 'benign neglect'. Senior managers consider volunteers nice but not essential, so they rarely monitor the accomplishments of volunteers or give the director of volunteer involvement the benefit of ongoing input from the administrative perspective. CEOs may want to engage volunteers but do not necessarily see this strategy as requiring vision or much management attention.

If only senior leaders could see what they are missing! Because volunteer initiatives languish from a lack of high expectations, volunteers are stopped from making a substantial impact and from achieving their fullest productivity. The unfortunate fact is that more volunteers are *underutilised* than are overburdened.

Over and over—and still as often in 2015 as in 1986, when Susan wrote the first edition of *From the Top Down*—colleagues say, with frustration, 'I just wish my boss would understand this!' The person responsible for volunteer engagement cannot do it alone. If your organisation has a human resources department head or a fundraising function, it's a sure bet that you, as executive, still get involved with situations involving employees or fundraising. The same must be true to ensure success with volunteers.

After years of contact with so many leaders of volunteers, we have become convinced that many of their concerns stem directly from a lack of substantive support from the senior managers in their organisations. This lack of support is due not to malice or unwillingness to help but to a lack of understanding about what is really needed from them—and little information actually geared to an executive.

In fact, a series of focus groups held by the University of Texas at Austin in 2009 found that many executives lack a sufficient understanding of what is required for effective volunteer involvement. Other executives confided that they were concerned about possible negative public relations that might be generated by a disgruntled volunteer and feared that they would not be able to resolve disputes should they arise. The findings from this research, highlights of which will be shared throughout this book, are captured in Sarah Jane Rehnborg's *Strategic Volunteer Engagement: A Guide for Non-profit and Public Sector Leaders*.¹

Very little has been published about the volunteer-related issues that deserve executive attention. It is probably an accurate assumption that most executives were not taught anything about volunteers in their formal schooling. There may have been some time spent on the interrelationship of executives with their boards of directors, which is one aspect of working successfully with volunteers, but—with only a few exceptions, such as the American Humanics curriculum—few management texts or lecturers speak to the specific issues that will be raised in these pages.

That is why this book has been written for *top-level executives* of agencies, organisations, and associations, whether they are already involving volunteers or members or are considering starting organised volunteer or member participation.

Target Audiences

This book speaks to top-level organisation leaders. Depending on your setting, you might hold one of the following roles:

- Executive or managing director of a charity or not-for-profit organisation or its board chairperson
- CEO of a large institution, whether in the public, private, or voluntary sector
- Director of a government agency or department
- Leader of a professional society, trade association, faith community, or civic group in which you must activate members in voluntary participation

If you are not the very top decision maker, you may be part of the management team, a department head, a branch director, or a member of the board of directors or trustees (and therefore a volunteer yourself).

While some of the issues presented here may differ for the specifics or the size of your particular setting, there are really more similarities than differences among the types of organisations that involve volunteers. Volunteer management practices are generic whether your work is in social services, the arts, recreation, law enforcement, or environmentalism. And while there naturally are important practical differences from country to country, the basic premises laid out in these chapters are truly universal and international.

Your organisation may have no volunteers at present or may already benefit from a large, well-established volunteer team. You may have a long list of dues-paying but passive members or donors with the potential to

become more actively engaged. It is never too soon or too late to examine the concerns outlined in the following pages.

You may be seeking volunteers who are specialists in specific fields or those who are generalists—or both. The types of assignments your organisation offers to volunteers may range from long-term, ongoing work to one-time special events; some assignments may need to be done on-site in your facility, while others may involve independent work in the community or online.

This book is not meant to be a distillation of all the resources available on how to develop and manage a volunteer programme. The person you designate to lead volunteer engagement is encouraged to seek out those resources and learn more about the details of effective, daily volunteer administration. Rather, this book deals with issues that are directly in *your* control as the executive. It is also designed to be thought provoking and to provide you with a basis on which to make necessary decisions.

Research Shows . . .

In 2004, the Urban Institute released a landmark study, *Volunteer Management Capacity in America's Charities and Congregations: A Briefing Report*. The study was commissioned by the UPS Foundation, the Corporation for National and Community Service, and the USA Freedom Corps, and it is probably the strongest argument ever seen in the United States for the value of—in the words of the report—*investment* in volunteer management:

Funders and organizations that invest in staff volunteer coordinators and training will produce charities and congregations with a greater capacity to their use of volunteers. This report finds that investments in volunteer management and benefits derived from volunteers feed on each other, with investments bringing benefits and these benefits justify greater investments. We conclude that the value that volunteers provide to organizations they serve should make the effective management of volunteers a key priority.²

Further, consider what is revealed in these findings from the 2008 *Management Matters* report by the UK's Institute for Volunteering Research:

- Just 48 percent of organisations have a volunteer programme paid for from their core budget.
- Over a quarter of organisations did not have funding for supporting volunteers and therefore volunteer management.

- Just 50 percent of volunteer managers had ever undergone any training or education in working with volunteers.
- Only 6 percent of respondents devoted 100 percent of their time to volunteer management.
- The greater the percentage of time a paid staff person spends on volunteer administration, the less likely a charity is to report problems with recruiting.³

The researchers in the Urban Institute study also asked comparative questions about resources put into fundraising; 55 percent of agencies have a paid fundraiser while only 39 percent have a paid coordinator of volunteers. This research was confirmed in the 2009 *Deloitte Volunteer IMPACT Survey*:

Non-profits and corporations are more culturally aligned to solicit and manage cash gifts than volunteers. While 61 percent of non-profit employees with primary responsibility for fundraising have at least eight years of experience, just 25 percent of non-profit employees with primary responsibility for volunteer management have the same level of experience. Further, while only 5 percent of non-profits have no one specifically in charge of fundraising, nearly a quarter (24%) of non-profits have no one in charge of managing volunteers.⁴

To those of us committed to the effective engagement of volunteers, it is an enduring mystery why we must fight so hard to get organisational leaders to *pay attention* to this resource. The majority of executives would and do praise volunteers as ‘vital to our work’, ‘our community connection’, or even ‘the heart of our agency’. But in daily practice, this potential pool of limitless talent is largely off the radar screen. Raising money never leaves the agenda—why ignore raising friends? It’s easy to get an organisation to treat financial donors well—why not value time donors, too? (In fact, these are often the very same people, and we’ll be discussing the close connection between volunteer engagement and fundraising later.)

Mainstream or Radical?

Some of the concepts proposed in the following pages may seem radical. Actually, there is a fair mix of suggestions based on time-proven principles and of proposals articulated in print for the first time. In order to stimulate and stretch perspectives, however, we sometimes extend the boundaries of best practices. You are free, of course, to pick and choose among

the recommendations here to develop the form of volunteer involvement that will best meet your own organisation's needs.

Some readers may be feeling a bit uncomfortable in the suspicion that we are going to suggest lots of structure to bureaucratised volunteerism. Successful volunteering does not come from spontaneous combustion and so does need some structure. Most of our organisations today are already rather complex, and unless we develop clear ways for volunteers to participate in our activities, people in the community really do not know how to become involved. This is true whether the organisation is an agency, an institution, or an all-volunteer association.

It is important to avoid wasting the time of volunteers—which is exactly what happens if there has been insufficient planning to define and prepare the work to be done. It is a form of volunteer recognition to evaluate accomplishments and to establish standards for who can become a volunteer and how assignments are made. The best volunteer management serves to *enable* volunteer achievement, not limit it.

All the management principles that work effectively with employees apply equally to volunteers. But surprisingly enough, the theme of this book is not necessarily to treat volunteers in the same way you would treat paid staff. Volunteer management emphasises motivators such as choice, a positive working environment, and recognition, to which all workers will respond with increased morale and productivity. This book proposes that it may be better management practice *to treat employees as though they were volunteers!*

Old and New Vocabulary

The volunteer world has expanded to welcome an ever-growing range of new people seeking service opportunities. These folks often do not label themselves as 'volunteers', but they are certainly available community resources. At the same time, certain traditional types of volunteering are disappearing or metamorphosing into new forms. Depending on which expert's research you prefer, either we are turning our backs on the old 'nation of joiners', or we are 'rediscovering community'. These observations are not necessarily contradictory, and both may be true. The question is whether your organisation can adapt to the valid needs and wants of volunteers today.

The Word *Volunteer*

While still in common use, the word *volunteer* itself can repel as often as it attracts. Many people hear *volunteer* and immediately picture one of many

About the Authors



Rob Jackson

Rob Jackson has worked in the volunteering movement for more than twenty years, during which time he has led and managed volunteers and volunteer programmes in education, advice, fundraising, and children's services settings at local, regional, and national levels.

Rob worked for Volunteering England for six years, most of which he spent as director of development and innovation. Rob successfully generated over £3 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 (<https://www.ncvo.org.uk/policy-and-research/volunteering-policy/what-we-believe/volunteer-rights>).

In addition to his expertise in volunteerism, Rob has strong links with the fundraising world. He spent six years as a member of the Institute of Fundraising's Standards Committee and chaired the institute's working party, which developed the UK's first code of good practice on volunteer fundraising.

In 2011 Rob established Rob Jackson Consulting, Ltd. (<http://www.robjacksonconsulting.com/>), and he now provides consultancy, public speaking, and training services on a range of topics; strategic volunteer engagement remains at the core of his work. Rob works with clients large and small in the UK, Europe, Australia, New Zealand, and North America, and provides support to the UK arm of the volunteer management software company Better Impact (<http://www.betterimpact.co.uk/>).

Rob continues to write extensively for the field. He coauthored the 2012 publication *The Complete Volunteer Management Handbook* (Directory of Social Change), has his own blog (<http://robjacksonconsulting.blogspot.co.uk/>), and writes a monthly 'Voice of Volunteering' column for *Third Sector Magazine* online.

Rob is an active volunteer, having previously served as chair of governors at a large Lincolnshire primary school. He is the founder and moderator of UKVPMs, the first e-mail networking resource for UK-based volunteer programme managers, and is a member of the editorial team for *e-Volunteerism.com: The Electronic Journal of the Volunteer Community*, an international journal on volunteering issues.



Susan J. Ellis

Susan Ellis is president of Energize, Inc. (<https://www.energizeinc.com>), an international training, consulting, and publishing firm that specialises in volunteerism. She founded the Philadelphia-based company in 1977 and since that time has assisted clients throughout North America, Europe, Asia, Latin America, the Middle East, and Australasia in creating or strengthening their volunteer corps. She has conducted training sessions and consultations in the UK on a regular basis since 1992.

Susan is the author or coauthor of fourteen books, including *From the Top Down: The Executive Role in Successful Volunteer Involvement* (3rd American edition, 2010), *The Volunteer Recruitment Book*, and *The Last Virtual Volunteering Guidebook* (2014). She has written more than 120 articles on volunteer management for dozens of publications, has posted a provocative 'Hot Topic' essay on the Energize, Inc., website monthly since 1997, and has written the national bimonthly column 'On Volunteers' for *The NonProfit Times* since 1990.

Energize's comprehensive website has won international recognition as a premier resource for leaders of volunteers. Since 2000, Susan has been the publishing editor of the field's first international online journal, *e-Volunteerism: The Electronic Journal of the Volunteer Community* (<http://www.e-volunteerism.com>). Energize, Inc., also offers *Everyone Ready*[®], online volunteer management training for organisations and individuals (<http://www.everyoneready.info>), for which Susan serves as the dean of faculty.

Susan is an active volunteer in a variety of volunteerism associations and community groups.

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