Everyone Ready®

Achieve more when *everyone's* ready for volunteers

FROM ENERG!ZE

Online Seminar Trainer's Handouts

Keeping Volunteers Motivated (So They Stay!)

Trainer: Betty B. Stallings

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Why People Volunteer
(just a few possible motivations)

From *The Volunteer Recruitment (and Membership Development) Book*, 3rd ed., by Susan J. Ellis, copyright 2002, Energize, Inc.

- To feel needed
- To share skills
- For a change of pace
- To get to know a new community or neighborhood
- To help someone
- Because a family member or friend pressured them
- To gain leadership skills
- To get a change from being a leader
- To act out a fantasy
- To do their civic duty
- To earn academic credit
- To be with people who are different than themselves
- To keep busy
- The agency is geographically accessible
- To do something with a friend or family member
- To learn the truth
- To do one's share
- To see that resources are well allocated
- For recognition
- To make new friends
- To explore a career
- Parenthood
- To demonstrate commitment to a cause or belief
- To help a family member
- As therapy
- To do something different than their daily job
- For fun!!!
- For religious reasons
- To keep skills alive
- To repay a debt
- To donate their professional skills
- As a family tradition
- To be challenged
- To be able to criticize without personal jeopardy
- Because there is no one else to do it
- To get the meals, transportation, or other benefits
- To assure progress
- To protect clients from an institution
- To feel good
- To have an impact
- Because their boss expects it
- To be part of a team
- To learn something new
- To be an advocate
- To gain status
- To get out of the house
- For freedom of schedule
- Because they were asked
- Because of who did the asking
- To test themselves
- As an excuse to do something they love
- For escape
- To become an "insider"
- To be an agent of change
- Because of their personal experience with a cause or problem
- Guilt
- Because of interest in or concern for the particular client group
- To gain access to services for themselves
- To experiment with new ways of doing something
- As an alternative to giving money
- To be a watchdog
- To feel proud
- To stand up and be counted

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Understanding Retention

"Retention" of volunteers is an *outcome*, not a task.

Retention can only be defined *in relation* to the commitment made by each volunteer at the start of service.

Volunteers will remain committed to your organization when these elements are present:[1]

- ***Clarity*…of the mission and of their roles in that mission**
- ***Competency*…tools and resources to do the work well**
- ***Influence*…input into their job design now and in the future**
- ***Appreciation*…support and acknowledgement for their contributed time**
- ***Enjoyment*…in meaningful work with others who share the passion for the mission**

[1] Adapted from the work of Dennis C. Kinlaw, *Coaching for Commitment*, (San Francisco: Jossey-Bass/Pfeiffer). 1999.

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Analyzing Volunteer Management Processes

From *Keeping Volunteers: A Guide to Retention* by Steve McCurley and Rick Lynch (Olympia: Fat Cat Publications), 2005, pages 53-56. *Reprinted with permission.*

The points of contact at which the customer tends to form judgments about the quality of service are often referred to as "Moments of Truth." What follows is an attempt to guide you through a self-reflective examination of your volunteer management system, viewing it through the eyes and experiences of the volunteer. We'll divide the examination into four stages:

1. The prospective volunteer's initial approach to the charity
2. The process of first interviewing and matching the volunteer with a position
3. The ongoing working relationship of a volunteer with the charity
4. The follow-up by the charity with volunteers who have completed their term of service

As you work through the questions consider:

- What perception is likely to be formed by a volunteer during this interaction?
- What can be done to shift that perception in a more positive direction?

1. Initial Approach

This stage covers the first experiences of the prospective volunteer with the charity, sometimes before the charity is even aware of their interest.

Initial Awareness

- Does the potential volunteer have an impression of your organization and its operation before contact is made?
- Is this impression favorable, accurate and complete?
- What do others say about your organization?
- How does the potential volunteer learn enough about you to even know that you are a possible source of volunteer work?
- Is your descriptive material readily accessible?
- Are your organizational materials available in languages matching the make-up of your community?
- Are those pictured in your materials representative of the community in which your organization operates?
- Do materials outline what the volunteer can expect to receive and answer the initial questions that the volunteer is likely to have?
- Do materials give the potential volunteer a reason to choose your organization rather than another one?
- Are your descriptive materials so crowded with detail that no one would be inclined to read them at all?
- How does the image of volunteering with you look to different cultures, age groups, and populations than the ones you currently involve?

Approach to the Organization

- Is it easy for the potential volunteer to come to you?
- Are their multiple ways that a volunteer can access you – phone, personal visit, Website, etc?
- Are you located so that the volunteer can access you easily?
- Do you look approachable?
- Are there clear directions to guide volunteers to those who will begin to interact with them?
- Have you considered setting up off-site contact points that might be more accessible to potential volunteers – at shopping areas, libraries, schools or other places where people congregate?

Analyzing Volunteer Management Processes *(continued)*

First Contact

- Do all staff receive training on how to deal with a prospective volunteer?
- How are volunteers treated by the first person with whom they have contact?
- Does that person make them feel welcome?
- Can that person help them clarify their interest in volunteering?
- Does that person make them begin to understand the process through which they will become involved?
- Does that person verbally express interest and gratitude?
- Is there a set packet of introductory materials that can be sent to prospective volunteers to educate them about the charity?
- How long does it take to call back interested community members who expressed an interest in volunteering?

2. Interviewing and Matching

This stage covers the discussion between charity and the volunteer about volunteering application process, volunteer interview, and the decision about an appropriate volunteer

Internal Referral

- Are potential volunteers efficiently referred to others for assistance, without giving them the impression that they being shunted off on someone else?
- Are they guided, rather than abandoned?
- If multiple referrals are necessary to resolve volunteers' questions, is there a clear reason for this which is explained them?
- If the volunteers are referred to others, are they offered the choice of having the person call them versus their having back to call back the charity?
- If the primary volunteer program contact is not available, how long is the delay before the potential volunteer is called back?

Initial Application

- How are potential volunteers initially treated by the person who will be responsible for working with them?
- Are prospective volunteers made to feel important and welcomed, or do they feel like they are imposing?
- Is care taken to understand the volunteer's needs and perspectives?
- Do volunteers feel like they are the ones whose needs are paramount and that the intent of the organization is to bend all resources to make them feel satisfied?
- Are attempts made to minimize paperwork which must be completed by the volunteer and to explain the purpose and need for all paperwork that remains?
- Is a prospective volunteer sent information about the organization and its work to consider before coming in to further discuss volunteering?
- Are forms available in alternate formats for those with reading impairments – such as Braille or enlargeable computer files? Are forms available in alternate languages?

Negotiation and Interviewing

- Is the initial volunteer interview conducted at a time and place convenient to the prospective volunteer?
- Is the location for the interview likely to put the prospective volunteer at ease? Is the interview conducted more as a friendly chat or an interrogation?

Analyzing Volunteer Management Processes *(continued)*

Negotiation and Interviewing (continued)

- During the negotiation process over the work to be performed, does the volunteer understand why the negotiation over time, screening requirements, etc. is taking place, and does the volunteer feel satisfied about the bargaining process and its outcomes?
- Are volunteers given options about their type of work and scheduling?
- Do volunteers feel that you are as interested in making this work for them as for you?
- If screening or placement procedures are lengthy does the volunteer receive periodic contact updates?
- Is the prospective volunteer involved in ways other than directly volunteering during this waiting period - shadowing, observing, etc.?

3. On-Going Working Relationship

This stage concerns the on-going interaction of the volunteer with the charity.

Working Process

- Do volunteers understand the process through which the work will be rendered and their role in that process?
- Are the roles and responsibilities of others with whom the volunteer will be working clearly spelled out?
- Are volunteers allowed to voice their opinions about how the work should be performed?
- Are these opinions regularly solicited?
- Does the volunteer feel a partner in what is going on?
- Do we attempt to keep paperwork that must be completed by the volunteer at a minimum?
- Do procedures assist volunteers in developing relationships with other volunteers, clients and staff or deter them from doing so?

Updating

- Are efforts made to keep the volunteer informed about the progress of the charity?
- Are these efforts initiated by the organization or does the volunteer have to perform them?
- Is the volunteer kept apprised of developments which will impact their ability to work?
- Is the volunteer invited to meetings in which the conduct of the charity is discussed and at which decisions are made?
- Does the volunteer participate in making these decisions?
- If key aspects of the work assignment change, is the volunteer informed of the need for these changes?
- Does the volunteer participate in determining how their own role might change or develop over time?

Delivery of Product

- Are volunteers given feedback about the performance of their work on a regular basis?
- Is this feedback designed to allow the volunteer to perform the work more effectively?
- Does the volunteer receive supervisory time and attention?
- Are volunteers recognized for their contribution on both a formal and informal basis?
- Is this recognition given in a way that shows respect for the volunteer?
- Are volunteers asked to provide their own feedback about the quality of the work being performed?
- Are volunteers empowered to add their own thoughts and input into the way work is done and the type of work they are assigned?

Analyzing Volunteer Management Processes *(continued)*

4. Follow-Up

This final stage concerns the relationship between the volunteer and the charity after the volunteer completed their initial term of service, including the volunteer has moved on.

Departure

- Do volunteers perceive that the organization has enjoyed their participation and would like the volunteer to continue the relationship?
- Are volunteers made to feel as though they may return to the organization, even if they are interested in changing their volunteer assignment?
- Are these options explained to volunteers far enough in advance for them to consider their interests?
- Is an exit interview conducted to determine why a volunteer wants to depart?

Follow-Up

- Are attempts made to pro-actively contact volunteers who have completed their commitment to update them about services that have been rendered?
- Is additional information which might be helpful routinely sent to potential repeat volunteers?
- Are they kept on newsletter lists?
- Are they invited to activities or volunteer recognition events?

Continuing Contacts

- How are volunteers greeted and treated if they approach the organization for a second service?
- Are they remembered, recognized, greeted as old friends, or do they start all over again?
- Are records kept of volunteer service that will even identify who has volunteered before and indicate what they were involved in?
- Are records kept of those who previously received services or participated in the program as clients who might come back in latter years to "give back" as volunteers?

When performing this examination, do not be limited to the questions above. Your examination should essentially "track" a volunteer through all the processes they encounter as they work with your organization. Put yourself in the place of the volunteer, view what is happening from their perspective, and analyze how confusing or cumbersome the process may appear to them.

One of the best ways to undertake this analysis is to involve new volunteers, many of whom will have distinct memories of what they found unfamiliar or uncomfortable. While some of these items seem insignificant, each of them can create a barrier that leads to the loss of volunteers.

Performing this analysis can tell you a lot about why you may be "losing" volunteers, especially if you seem to have poor retention during the early stages of volunteer involvement.

Establishing a Motivating Atmosphere for Volunteers

For more details about the Points of Contact in column 1, refer to the sets of questions in the excerpt, "Analyzing Volunteer Management Processes," by Steve McCurley and Rick Lynch.

Points of Contact for Each Volunteer	What We Do	What We *Want* to Convey by Our Actions	What the Volunteer Actually *Experiences*	*How could we make this more motivating?*
Our public relations and recruitment materials				
A prospective volunteer makes first contact with us				
Our volunteer application process				
The initial volunteer screening interview				
Matching a new volunteer to his/her first assignment				
Orientation and training for a new volunteer				
Supervisory contacts with a paid staff member or leadership volunteer				
Feedback on performance				
Periodic assessment of how things are going				

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Establishing a Motivating Atmosphere for Volunteers *(continued)*

Points of Contact for Each Volunteer	What We Do	What We *Want* to Convey by Our Actions	What the Volunteer Actually *Experiences*	*How could we make this more motivating?*
In-service training or ongoing learning to keep updated				
Opportunities for variety of activities or advancement				
Informal recognition				
Formal recognition				
Reaching the first year anniversary				
During a crisis at the organization				
Exit interview				
Contact after a volunteer leaves				
A single day of service or special event				
Other				

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Sustaining Involvement with Today's Volunteers

A. Check ideas that may positively impact your ability to attract/motivate today's short-term volunteers:

- ☐ We offer flexible time-frame positions to attract today's volunteers.
- ☐ We sub-divide large roles into smaller tasks that can be accomplished at least partially by short-term volunteers.
- ☐ We do not use the words "position" or "committee" as they sound…..forever!
- ☐ When inviting volunteers to a group project event, we use words such as: day of, just-in-time, flex-time, drop in, done in a day, etc.
- ☐ We make sure that any volunteer's first experience with our organization is FABULOUS. (This means: being organized; volunteers know they make a difference; atmosphere is fun and full of appreciation; there is a follow-up system to discover if those attending might desire further involvement with us.)
- ☐ We find out as much as possible about the people who volunteer for us on a one-time or short-term basis.
- ☐ We offer trial periods or opportunities to shadow experienced volunteers before new people make a commitment.
- ☐ When we interview prospective volunteers, we tell them the amount of time commitment we need (and obtain their agreement) so that they know the training we give them is an investment by the organization as well as a benefit to them.
- ☐ We have created a "Borrow an Expert" file for those folks who want to contribute their skills in flexible time periods.
- ☐ During recruitment and orientation, we engage active volunteers to share their experience and information with prospective volunteers
- ☐ Even when volunteers are involved in one-time events, we give them an overview of the organization's mission and the many options for volunteer engagement beyond this single day.

(Continued next page)

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Sustaining Involvement with Today's Volunteers *(continued)*

B. Check ideas that may positively impact your ability to motivate current volunteers to continue serving your mission:

- ☐ Allow volunteers to take breaks or "sabbaticals," but stay in touch while they are away.
- ☐ Recognize and appreciate volunteers every day they donate time to your organization.
- ☐ Ask volunteers for their feedback on their involvement and input to their work.
- ☐ Offer incremental opportunities for growth and leadership.
- ☐ Help create friendships between volunteers and paid staff to anchor volunteers to the organization.
- ☐ Remember…most volunteers want to have some FUN while volunteering.
- ☐ Conduct periodic informal and formal "re-commitment" conversations to help keep people motivated to continue serving your organization in some capacity.
- ☐ Understand that volunteer motivations change over time, so ask: "How can we keep you connected to our mission?"
- ☐ Offer promotions to volunteers to become mentors and coaches to new volunteers.
- ☐ Create a system that enables trained volunteers to substitute for each other when they need to be away for short periods.
- ☐ Make sure that volunteers are given a full orientation to the organization and that they are empowered to carry out whatever work they have agreed to do effectively.
- ☐ Build commitment to volunteers among paid staff.
- ☐ Create leadership opportunities/options for increased incremental commitment for volunteers.
- ☐ Don't encourage/allow one person to hold the same position too long.
- ☐ Survey volunteers who left the organization to determine if there are chronic issues pushing people away – and then do something about what is identified.
- ☐ Accept the reality that some volunteers will NEVER want increased involvement, and that's OK.

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Resources and Further Reading on Volunteer Motivation and Retention

OTHER RELEVANT *EVERYONE READY* RESOURCES

Depending on the *Everyone Ready* membership level of your organization, you may have access to some or all of the following topics. To access, just go to the "All Topics" section of your Main Page (located on the right in the orange sidebar) and use the search/sort functions to get to a topic.

Effective Supervision: A Seminar for Busy Staff Who Partner with Volunteers. Online Seminar by Betty Stallings.

Generations: Adapting to Volunteers of Different Ages. Online Seminar by Peter C. Brinckerhoff.

Handling Challenging Behavior by Volunteers. Online Seminar by Steve McCurley.

Informal Volunteer Recognition: Creating a Culture of Appreciation. Self-Instruction Guide by John L. Lipp.

New Approaches to Volunteer Recruitment. Online Seminar by Susan J. Ellis.

Principles of Volunteer Management: No Matter What Your Job Title. Online Seminar by Susan J. Ellis, Andy Fryar and Betty B. Stallings.

BOOKS

Hager, Mark A. and Jeffrey L. Brudney. *Volunteer Management Practices and Retention of Volunteers.* Corporation for National Community Service, UPS Foundation, and the Urban Institute, June 2004. Available as a PDF at http://www.urban.org/url.cfm?ID=411005. Retrieved 10/2011.

Kinlaw, Dennis C. *Interpersonal Strategies for Obtaining Superior Performance from Individuals and Teams.* Jossey-Bass/Pfeiffer,1999.*

Lee, Jarene Frances with Julia M. Catagnus. *What We Learned (the Hard Way) about Supervising Volunteers.* Energize, Inc., 1998.*

McCurley, Steve and Rick Lynch. *Keeping Volunteers: A Guide to Retention.* Fat Cat Publications, 2005. (Premier resource on this subject. Includes extensive references on the topic of retention in Chapter 12.)*

Stallings, Betty B. *Training Busy Staff to Succeed with Volunteers: The 55-Minute Training Series: Volunteer Motivation (Training Module 4),* Energize, Inc., 2007.*

Wilson, Marlene. *Visionary Leadership in Volunteer Programs: Insight and Inspiration from the Speeches of Marlene Wilson*, Energize, Inc., 2008.*

Wittich, Bill. *Keep Those Volunteers Around*. Knowledge Transfer Publishing, 2002.*

* Can be purchased using your *Everyone Ready* discount code in the Energize, Inc. online bookstore at www.energizeinc.com/bookstore . Your discount code, which you will need to enter upon checkout, can be found on your *Everyone Ready* Main Page.

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ARTICLES

"Commitment With or Without a Stick of Paid Work: Comparison of Paid and Unpaid Workers in a Nonprofit Organization." Research to Practice in *e-Volunteerism,* Vol. IX, Issue 1, Oct. 2008.*

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Lockhart, Donna. "Adjust Your Thinking: Shifting the Focus to Volunteer Retention." CharityVillage, 2008. http://www.charityvillage.com/cv/research/rvol58.html . Retrieved 10/2011.

Lynch, Rick. "Volunteer Retention and Feelings of Connection." *e-Volunteerism*, Vol.I, Issue 1, Oct-Dec 2000.

McKee, Tom. "'Oh, By the Way!' The Four Words that Volunteers Hate to Hear." http://www.volunteerpower.com/articles/OhByTheWay.asp . Retrieved 10/2011.

"Millennials: Incorrigible or Innovative?" Research to Practice in *e-Volunteerism*, Vol. XI, Issue 3, April 2011.*

Spinks, Kerrie. Who Needs Balance? How the Work-Life Balance of Volunteers Impacts Them and Your Organisation, *e-Volunteerism*, Vol. X, Issue 1, October 2009.*

"Volunteers Aging in Place." Keyboard Roundtable in *e-Volunteerism*, Vol. V, Issue 4, July-Sept 2005.*

WEB SITES

CASA
http://nc.casaforchildren.org/files/public/community/programs/ProgramResources/Volunteer_Retention_Lynch.pdf . Retrieved 10/2011.
Provides generic information on retention written by Rick Lynch and Steve McCurley for Court-Appointed Special Advocates (but universal in its application).

Volunteering in America: Resources for Retention
http://www.nationalserviceresources.org/via#retention
Resources compiled by the Corporation for National and Community Service

* To read articles, access the *e-Volunteerism* journal from your *Everyone Ready* Main Page.

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Betty B. Stallings, M.S.W.

Betty Stallings is a highly regarded international trainer, keynote speaker, consultant, and author specializing in volunteer management, fundraising, leadership and board development. She teaches at universities, provides training for state, national, and international conferences and consults with many non-profit organizations, public programs, and foundations. Participants in her audiences and seminars note her vitality, inspiring message, engaging humor, practical presentations, and valuable resources.

For the past 18 years, Betty has been the president of Building Better Skills whose mission is to inspire and empower people to effectively attract and utilize volunteer and financial resources to achieve their organization's mission. Her Web site is http://www.bettystallings.com where she gives free training resources and carries some of the best books and resources supporting volunteerism and fund development.

Betty has received numerous awards for her dedication to volunteerism and philanthropy, has previously written six books and many training curriculums and articles. Among the best-known titles are *Getting to Yes in Fundraising*, *Training Busy Staff to Succeed with Volunteers: The 55-Minute Staff Training Series*, and *How to Produce Fabulous Fundraising Events: Reap Remarkable Returns for Minimal Effort*. In 2005, she researched the impact of executives on successful volunteer involvement. Energize, Inc. published the results of that study in the free e-book *12 Key Actions of Volunteer Program Champions: CEOs Who Lead the Way*. Betty latest book (September 2010) focuses on the critical role that executive staff must play to ensure effective volunteer involvement: *Leading the Way to Successful Volunteer Involvement: Practical Tools for Busy Executives*.

Since 2000, Betty has served as the editor/designer in charge of the "Training Designs" feature section *e-Volunteerism: The Electronic Journal of the Volunteer Community*.

A lifelong volunteer, Betty also founded and was the fourteen-year executive director of a volunteer center in the San Francisco Bay Area. While at the center she initiated programs which served as national models for volunteer utilization and also obtained funding and supervised innovative research on volunteer management resulting in her volunteer center's publication of the book, *At the Heart—The New Volunteer Challenge to Community Agencies*.

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