

**MANAGEMENT OF UNPAID WORKERS
FROM VOLUNTEERS TO BOARD MEMBERS
Recruitment, Retaining and Training
(Many aspects also relate to employee relations.)**

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Although much of this five-page handout relates to promoting the effective relations and outcomes to which all workers contribute, use the guidance to improve management of volunteers especially. Adapt it to your unique goals, values, resources and culture.

The Reality

There are thousands of books, training manuals, workshops and other guides for managing volunteers. But many nonprofit managers, staff, Board members and leaders have limited time and resources for enhancing their knowledge, let alone adapting and applying advice. Instead, survival and current tasks understandably get the attention.

Yet limitations of resources and time make attending to long-term viability even more crucial. One means is effective, respectful use of volunteers, from board members to clerical assistants. To do this, the natural tendency to focus on task over maintenance of relationships needs to be tempered. In fact, a balance between the two aspects of management benefits both people and purpose.

Working well with unpaid workers at whatever level can be more challenging than managing employees. Since their benefits are intangible --- psychological (psych) pay and recognition --- they are in charge of how long they want to participate as well as their level of commitment and caring. You depend on them, not vice versa.

Strategies

In order to reap fuller benefits for your work and the volunteers themselves, treat recruiting and retaining volunteers as a continuum. For example, every discussion with a prospective volunteer leaves an impression and provides opportunities to attract new recruits as well as funds and other resources. Every supervisory experience can show how to make future work and relationships more effective. Every exit interview provides information about how to create better matches between volunteers and your organization. In other words, taking additional time and care in the short run can save energy and resources in the longer run.

Specific Suggestions and Actions follow.

Recruitment Sources

The best source of new volunteers is current and past people who have had good experiences supporting the work of your organization. Here are other sources you may want to renew, adapt or develop:

- Volunteer clearinghouses
- Professional and business organizations whose members have relevant skills and interests
- Pitches and reports provided by in-house publications of related organizations.
- Local newspapers that accept notices and free advertising
- Periodicals willing to publish stories about your efforts, including volunteer experiences
- Volunteer-oriented Web sites, blogs and newsletters
- Churches, synagogues, mosques and other places of worship
- Personal and professional networks of staff and Board members
- Grantmakers and their networks
- Contacts through institutions, organizations, groups and individuals served
- Informal conversations
- Current and previous, effective volunteers (e.g. campaign of each one, recruit or bring one)
- Add you own ideas:

Here are ways to maintain and improve relationships with volunteers.

Preparing to Do the Work

- Provide appropriate information, guidance and context for doing the work.
- Arrange considerate scheduling.
- Specify how goals, activities and accomplishments of the organization can serve volunteers' interests.
- Show how the volunteer's skills and abilities relate to the mission, products and services of the organization

Enriching the Process of Doing the Work

- Provide useful feedback and recognition that's timely and has meaning to the recipient.
- Encourage social connections and psych pay through team-building, productive meetings, get-togethers and other means.
- Develop opportunities for continued learning, including formal and on-the-job training.

- Continue to adjust matches between what is needed to be done and meaning and value of the work to the individual.
- Define and find together other benefits to the person whenever possible.
- Delegate worthwhile work, while providing guidance and quality control.
- Engage the person in assessing the current situation and future possibilities, for self and system.

Staying Alert to Danger Signs

Typical reasons that volunteers leave not only confirm these ideas, but also provide warning signs to heed:

- unrealistic expectations (volunteer, peers, supervisor, staff, Board etc.)
- work that's too demanding, routine or boring
- lack of useful, timely and appreciative feedback
- inadequate support
- disillusionment about people or the organization

Using the Dynamics of Retaining Volunteers

As discussed above, serving each volunteer's needs and interests is a key to retention. Information for this can come from regular formal discussions, informal chats and observation.

Another way to get insights and data, as well as catch danger signs is via a short questionnaire. Use it just to guide conversation or as a formal document. The process provides data to:

- clarify mutual expectations
- anticipate and track issues
- synthesize and compare responses from a variety of volunteers
- learn from mistakes

Here are possible questions to adapt:

- What are your goals for doing this volunteer work? (Discuss nature of the work for mutual understanding.)
- How can we help you meet your goals?
- What skills, knowledge, resources and experience do you want to contribute?
- What would you find helpful to discuss periodically to ensure we serve one another's interests?

To tailor supervision to individual interests, consider how David McClelland's perspectives on motivation relate. They will help you to determine the unique preferences of each person as well as focus discussion and support. They will also help

you appreciate the balance among your volunteers and issues related to their relationships. Here are the three motivational preferences:

- achievement
- affiliation
- power

Each individual is likely to have all three motivations, but in differing sequences or hierarchies. The challenge to the manager is to understand and serve the needs of the organization *and* the volunteers.

To figure out the hierarchy of each person's motivational preferences, observe their choices, comments and work styles. You may also ask them directly and see how they respond to hypothetical situations you pose.

When there are problems with how things are done (or not done) and particular outcomes, consider the following questions and processes to improve the situation. Here is a quick paraphrase of the considerations suggested by Robert F. Mager:

- Can the person do it? If not, find another.
- Does the person want to do it? If not, redefine the task to make it more attractive or give it to someone else.
- Does the person know how to do it? If not, train.

Another consideration is where the person fits into these levels of development:

- Start-up or learning phase
- Settling-in time
- Mastery of subject and situation
- Saturation, or boredom with mastery, prompting need for renewal of work or departure

Think about how the foregoing could also be used to understand the dynamics of work groups and invigorate them as well.

Conclusion

For each level of development of the individual, group and organization, periodically re-visit how to adapt, renew or enrich the work and relationships. For the work itself, describe it --- including expectations and opportunities --- as clearly as possible. Since no aspect of human effort is likely to remain constant, attend to the opportunities in changing circumstances.

Everyone involved will benefit from seeing recruitment and retention as a continuing and interactive process that can promote enjoyment of activities and support general management goals. An attitude of use 'em and lose 'em toward volunteers, from Board

members to assistants, will not strengthen the viability of the organization nor the quality of work life.

Serve long-term interests, then, by creating norms and opportunities for formal and informal feedback based on mutual trust and respect. Anticipate problems and limitations, discussing them early, honestly and clearly. Be alert to developing a culture where that is possible.

By attending to adapting these generalities and the specific suggestions above, you will be more likely to match expectations with realities, to use resources well. You can also ensure that issues are anticipated, minimized, addressed and resolved, insofar as possible. Finally, by respecting how individual differences can be synchronized with the mission and vision of the organization, people are more likely to invest, stay committed and care. As they contribute their best, human resources are used well and everyone wins.

Additional Resources

The Schimel Lode can provide a range of handouts that suits your needs to improve the effectiveness of your organization. Examples include:

- Ways for Managers to Encourage Professional Development
- Self-Assessment of Leadership and Managerial Capacities
- Self-Assessment of Interpersonal Capacities
- Finding and Using Your Natural Work Rhythms to Make Progress
- A Power Trip
- Effective Listening
- Developing New Habits and Using New Skills
- Critical Thinking

Here is a sampling of books, among the many you may want to explore at www.amazon.com -books - volunteer management. Also visit www.boardsource.org and www.fieldstonealliance.org.

Leadership and Management of Volunteer Programs: A Guide for Volunteer Administrators by James C. Fisher and Kathleen M. Cole

Leading Without Power: Finding Hope in Serving Community by Max De Pree

The Volunteer Management Handbook by Tracey D. Connors, ed.

The (Help!) I-Don't-Have-Enough-Time Guide to Volunteer Management by Katherine Noyes Campbell and Susan J. Ellis

The Volunteer Recruitment Book (and Membership Development) by Susan J. Ellis

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