

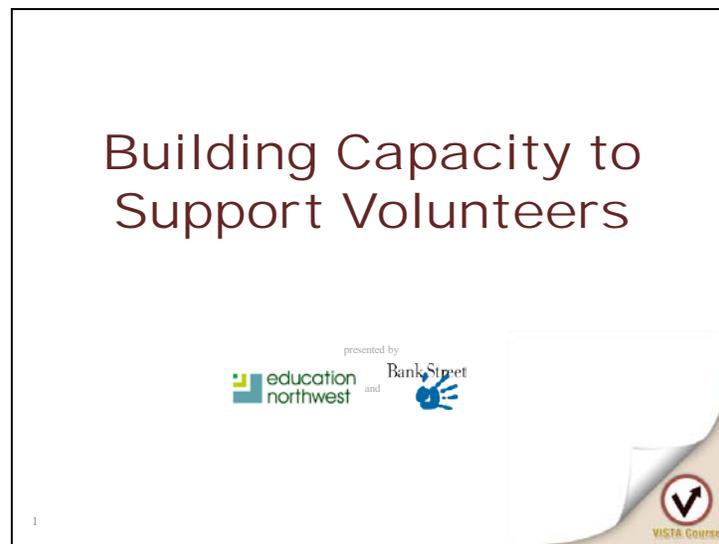
# **BUILDING CAPACITY TO SUPPORT VOLUNTEERS**

## **WEBINAR DELIVERED MAY 26, 2011 AT 11 A.M. PACIFIC**

### PRESENTERS

Steve McCurley, featured speaker  
Amy Cannata, Education Northwest (co-host)  
Erich Stiefvater, Education Northwest (co-host)

### ANNOTATED TRANSCRIPT



[Amy Cannata] Okay. So we are recording. Welcome to Building Capacity to Support Volunteers, our first webinar for the Volunteer Management course, and we have an exciting line-up for you guys today. We have Steve McCurley with us, and let me click to the slide so you can see his lovely face.

# Hello & Welcome!

**Presenter:**

**Steve McCurley**  
Consulting, training, writing  
Olympia, WA



**Webinar Hosts:**

**Erich Stiefvater &  
Amy Cannata**  
Education Northwest,  
Portland, OR



2



Steve's in Olympia, Washington, and Erich and I are here in Portland, Oregon, and we're really excited that you guys are able to join us for the first webinar. We know people are busy, so it's great that you could come on and be here for the live session.

So our presenter today, Steve, is an internationally known trainer and speaker in the field of effective volunteer and the -- I'm sorry, effective volunteer involvement, as well as the author of our course text, Volunteer Management, and he will be joining us today, as I said, from Olympia, Washington. So do you want to say hello, Steve?

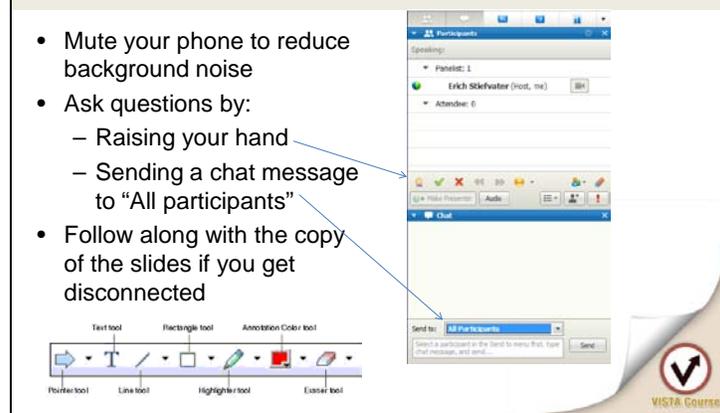
[Steve McCurley] Hi, guys.

[Unidentified participant] Hi, Steve.

[Amy] So we'll be hearing a lot more from Steve in a few minutes, but let's cover a few housekeeping items first.

## Housekeeping

- Mute your phone to reduce background noise
- Ask questions by:
  - Raising your hand
  - Sending a chat message to “All participants”
- Follow along with the copy of the slides if you get disconnected



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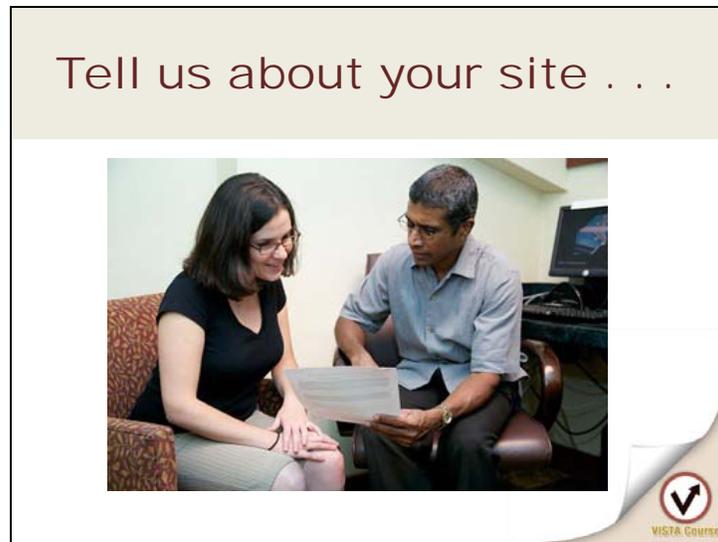
So we're looking at the housekeeping slide. We're asking folks to mute your phone if you have that option. You can also do this by right clicking on the phone icon next to your name in the Participant panel, and it looks like several people have already muted their phone. Those of you that are just on the phone, we'll monitor background noise, and if it gets a little too noisy, Erich and I may mute everyone. But we'll be sure to un-mute you during Q&A.

Also, if you have a question at any point, feel free to use the “Raise hand” icon or you can type your question into the “Chat” panel, and we'll try to stop I think every once in a while to make sure that people who are just on the phone if you have questions, those will also get addressed. So bear with us. It's kind of a little bit of an experiment whenever we do these, but we'll do our best to get your questions answers and make sure that you have a chance to participate.

Okay. If for some reason you get disconnected, we've noticed that WebEx is pretty good about prompting you and saying, “You've been disconnected, click here to get started again.” But if that doesn't work, you can always follow along on the PDF of the slides, which are posted on the Moodle site for this assignment, and I also e-mailed them to you guys this morning with the reminder.

Okay. We may have a little time to do some whiteboard activity, and if we do, we will be using these tools down here [points to image of WebEx Annotation tools at bottom of slide] for the whiteboard, and we'll explain that a little more once we get to that activity.

So we're excited to get started here. Let's go to our next slide.



Steve and Erich and I put together a list of questions so that we could learn even more about your guys' sites. So what I'm going to do is launch a poll so that we can learn a little bit more about you guys. So I'm doing that now.

[Opens poll]

[Erich Stiefvater] And for Hayley and Jennifer, we're sorry that you're not able to see the poll but we're just asking a few questions about the service site where you're working as VISTAS. So, for example, whether your organization has a volunteer program or not, how many volunteers are involved, etc.

[Unidentified participant] Okay.

[Amy] So at this point, folks that are in WebEx should be seeing a poll on the right-hand side of your screen, and if you're not seeing it, you may need to click on the little arrow next to the polling sidebar. So we're getting answers coming in. Our first question was, "Tell us more about the type of assignment you have." Are you starting a volunteer program from scratch or are you tweaking an existing volunteer program, or maybe you don't know? And so far it looks like nobody so far that's on the line is starting from scratch. A couple people are tweaking an existing program. How about you guys on the phone, are you guys starting from scratch or are you working on an existing volunteer program?

[Unidentified participant] They already have an existing one. We're just also working on, like, a sub one for our services in particular, so it's kind of in between.

[Amy] Okay. Great. And it looks like most folks are working in recruiting new volunteers, several in "Other". So it looks like everybody answered the poll at this point.

[Participant Michelle] Hi, Amy. This is Michelle, and that question didn't quite apply to me. I am working for an Association of Volunteer Centers, and I'm not directly starting a volunteer program. We're tweaking one as opposed to building capacity for the association.

[Amy] Okay. What kind of tweaks will you be making?

[Michelle] Well, getting them to share best practices, really trying to bring value to the association. Share best practices on recruitment and retention, finding programs that some of the volunteer centers are already offering so that those programs might be replicated -- poverty-rated programs might be replicated in other parts of the state, those kinds of things.

[Amy] Great. So at this point, we published the poll, so you guys should be able to see that.

[Closes poll and shares results]

Thank you for participating. I'm going to go ahead and pass both the controls, as well as the presentation over to Steve who is going to take it away from here. So, Steve, let me just pass you the ball, and it's all yours, Steve. We're excited to hear from you.

[Steve] Thanks, Amy, and welcome, again, guys. We've got a small enough group that we're actually going to be able to do this in a much more interactive way, and I will actually from time to time try to haul in you guys who are just on the phone, but throw in things as you want to go. I want to do three things in terms of topical areas for this presentation.

## This discussion

1. Trust, credibility and consulting skills
2. Identifying organizational capacity and readiness
3. Thinking about high-impact volunteers

5



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One is we're going to talk a little bit about the nature of what most of you are doing and about building trust and credibility so that people will actually let you do it. We're going to talk a bit about what to look for inside the organization in terms of capacity and readiness, and those actually apply whether you're starting something new or just trying to change some of the practices or improve some of the practices that are already there. And last, we're going to talk a little bit about a subject that will show up periodically in these webinars, which is trying to get the organization to think more about involving volunteers in not the traditional ways they've been involving them, but in ways that really do produce an impact for the organization.

To summarize all this, I'm actually going to try to show you the approach that is likely to get the most cooperation from the people in the organization, talk a little bit about how you engender that cooperation and a bit about some of the problems you can encounter as you are attempting to really involve other people in helping you accomplish stuff.

## Your Work: what consulting is all about

- Consulting is an organized approach to working with people to identify problems and discover workable solutions.



In the outside world, what we're going to be talking about falls under the framework of doing consulting, and let me just say up front that consulting has a bad name usually because typically people tend to think of it as guys in suits carrying expensive briefcases who parachute in, drop things on people, and then leave; and we're going to take a very different approach from that. Consulting is actually a way to think about involving other people in solving problems, and it focuses on helping those people identify what will be workable solutions from their standpoint.

Consulting is actually one of those things that as a way of thinking as opposed to a big project kind of effort, most of you actually have done throughout your lives without really thinking about it, and as an example of that -- and, Amy, I actually think let's not do this as a whiteboard. Since we've only got a few people, if everybody can unmute, we can actually do this as a quick little conversation out here.

## Exercise: In what ways do you provide “consulting?”



What I'd like you guys to do is try to think of a time in more or less recent memory when you have tried to help somebody else find a solution to their problem. Now, that might range in my mind from simply you ran into somebody in the hallway and they asked you a question and you tried to clarify what would actually be useful to them, or some of you have done more formal stuff than that. Anybody got an example of what you've done in terms of working with other people to find solutions to things?

[Participant Kristi] I have.

[Steve] Which would be?

[Kristi] A couple years ago, my husband and I started a young adult program within our church. A lot of those kids were troubled kids and they had trouble either with the law or just kind of like accomplishing just regular life goals within themselves. So we had a lot of relationship building to gain that trust, and then to further guide them into avenues that they could have successful outcomes in their life where they hadn't had that before.

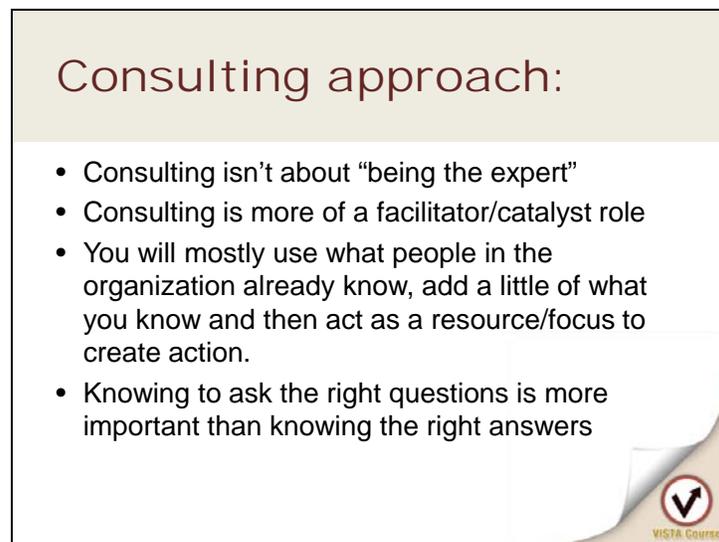
[Steve] Kristi, besides the kids, who else in the church did you end up working with in order to make that happen?

[Kristi] We had to work with their parents because it obviously had to be a group effort between the child and the parents as well. But then the other leaders within our church, which we didn't always have successful -- their support from that.

[Steve] Okay. Now that for the rest of you, is a big-thing example because putting together that kind of thing obviously involved working with a lot of people. Anybody got a smaller, simpler version?

[Unidentified participant] Well, I've worked with nonprofits and churches and small businesses consulting around fund government grant writing, some organization development, and public relations kinds of things.

[Steve] Okay. That would encompass all of those. Okay. Let me just make some comments about all of this, and the two of you probably may have seen this in what you were doing, and some of these points will seem obvious, but if you've never done them before, they sometimes look a bit tricky. Okay?



**Consulting approach:**

- Consulting isn't about "being the expert"
- Consulting is more of a facilitator/catalyst role
- You will mostly use what people in the organization already know, add a little of what you know and then act as a resource/focus to create action.
- Knowing to ask the right questions is more important than knowing the right answers

  
VISTA COURSE

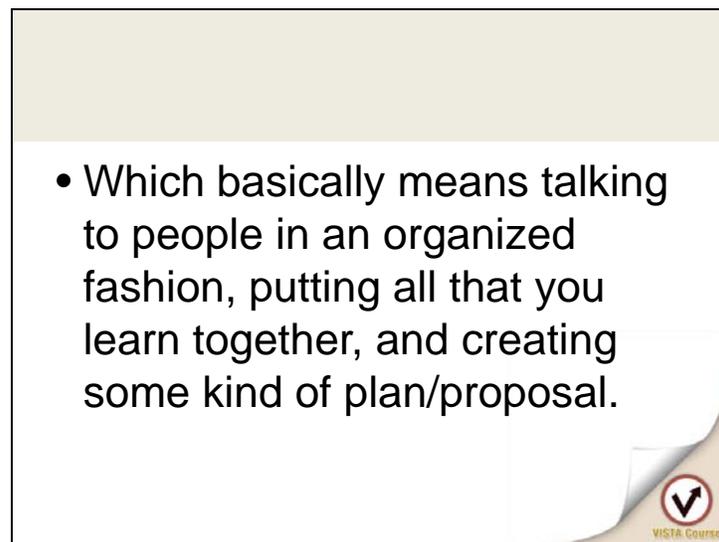
So what we are talking about in terms of the consulting approach has a number of elements. One is it isn't really about being the expert. You're not the person who has the precise answer you're just going to give to people. Instead, what you are actually trying to do is be more of a facilitator or a catalyst where you help those people identify what would be their answer. And part of the rationale for that is just a blatant part of human nature; that people are more likely to have an affection for stuff that they think they had some shaping of, which is why I use the phrase, help them identify their answer not your answer for doing things.

So as the person who is there, you've got the ability to talk to people, to gather information, be the facilitator or the catalyst, and help make things happen. Now for that, you can mostly use what people in the organization already know, even when occasionally they don't realize it, add a little of what you know, and then basically act as a way to focus all that

information and get people to, then, do something with it. And very often what you will find in organizations is that you encounter situations that everybody knows about, everybody had already thought of what a potential answer for, and very often they will be in agreement but they still haven't done anything.

And the reason for that is that, particularly in busy non-profits, there are more problems than there is time to fit to them. So part of what your role is is to provide that opportunity for somebody who has got the time to gather all that stuff together, point out what is the obvious answer to everybody, and then actually help do the work to get that sort of thing launched and started and turned from being something we know about to something that we actually do something about, very different kind of thing.

And as is commonly the case in this, knowing how to ask the right questions is actually more important than knowing the right answers, because the questions are what involve people, get their ideas into the mix, give you a better sense that you find a common solution that people are going to buy into, and merely the process of asking questions will tend to generate some pressure in the organization to actually do something with those questions and with the answers that you've come up with all of that.



So to put in it a shorter, simpler way, consulting is about talking to people in an organized fashion, planning out what you do, putting all that you learn together, and then putting that into some sort of plan or proposal that sort of walks people through how we're going to do all this stuff, what we're going to do, who's going to do it, who's going to be responsible for it.

## The hard bits:

- The toughest part of consulting is that often people don't know what they want, but they know for certain what they don't want.
- The trickiest part of consulting is that to be successful you have to think beyond finding the immediate solution to the problem.



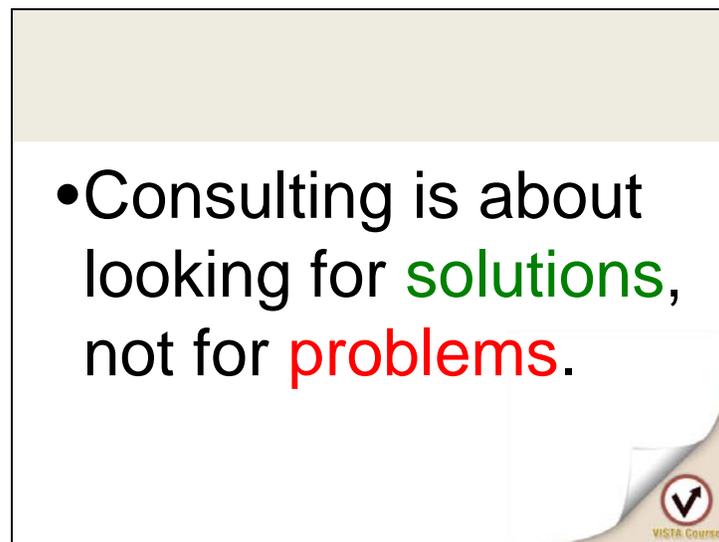
Now, I have made that seem slightly easy; but there are, in fact, some hard bits of doing that -- that I'll go back to some of you who have done this before to chime in on. One is that very often people will have a vague notion of what they want to do, but it will be vague. It will be sort of, "We have this thing in mind we want to get to, but we haven't thought through all the things that might be required to do it." And while all that stuff is still vague, what they'll also have, what they often will not directly tell you is a very sharp notion of what they don't want to have happen; fears, things that could blow up, and only if you kind of dig for those things will people then tell you, "Well, I don't know exactly what I want, but I've got a clear idea of the things I don't want to see as you go through this process." So you have to work a little bit with people to see both sides of their equation.

Some of the things they don't want, maybe things they're actually slightly reluctant to tell you. Let me go back to the example for the person who is working with the Association of Volunteer Centers, a group that I've worked with a lot over the years. Inside of the state there are always these little political things happening where you might theoretically expect everybody to play nice but is always the case when you have real-world kind of politics, there are some real-world politics that comes into play in all of that.

So if you simply ask people, "What do you want done?" They'll tell you some things, but there are some things they won't tell you because they don't want to speak against somebody else because that's politically wrong, or they know there are different camps in this and they don't want to be identified in one of them or the other. So occasionally, as I say, you have to do a little work in order to get people to be willing to share information with you, and we'll get to how you go about doing that a little bit later in all of this.

The other part about the hard aspect of consulting is that if you're new to it you'll tend to focus on the problem or the issue that was presented to you, and you'll try to think, "How do I come up with a solution to that particular kind of thing?" And to be really good at this, you actually have to think a bit longer term than that because part of what other people will be thinking about is sure, we can make this change in what we do now in the fundraising volunteer program, and that will solve a problem, the one that you were focusing on when you came up with that idea. But since they've been around long enough, they'll realize that there are implications down the road for if we do that in this new way in this program.

How does that impact on other things that we're doing? And it will be anything from a really personal appraisal: "What's the impact on the amount of work I have to do in my job?" "What's the impact on what I'm going to be able to do well and, thus, look good in the organization?" As well as other things that may not be apparent to you because they've got a bigger perspective than you do and how you do things. So a good portion of being good is thinking beyond the immediate answer to think about, "Well, what's going to happen as people implement this, and is that going to be a good thing or a bad thing for them down the road, and how do we build things in early so that down the road everybody just getting happier and happier as things go along?"



Okay. All of this is the focus, then, on looking for solutions not just for problems, and in particular, looking for long-term solutions.

## The Importance of Trust

- You won't have the power to tell people what to do so you have to rely on their believing in you enough to decide to take a risk.
- Consulting is all about establishing and maintaining "trust."



Now the key to this, as you might suspect, is that people have to be willing to talk to you, and that's why trust is so critical when you are doing any kind of consulting relationship, so that people are willing to share with you, willing to work with you, willing to give you the benefit of the doubt as you come up with suggestions. Part of that is simply because one of the key attributes of what you're doing is that you don't have the power to tell people what to do, so you have to rely on their being willing to go along with you.

Now some of you may be under the impression that you actually have power, and even if you do, let me just tell you that's a dangerous thing to work off of, because imposing stuff on people tends to backfire either sooner or later, and more often sooner. And particularly one of the rules about bringing volunteers into an organization is that you can't impose those on staff. For staff to basically ruin a volunteer effort they don't have to be actively hostile, all they have to be is indifferent. So power cannot get people to actually look like they think something is a good idea.

Volunteers can almost always tell the difference in an organization where the staff really want them to be involved versus ones where the volunteers are perceived as not being what the staff would like to have involved. And volunteers, frankly, leave as fast as possible as they can under those kind of circumstances, so consulting actually boils down to establishing and then maintaining trust with people. So a couple of quick tips on that that will link back to stuff you'll see, I think, I guess next week, Amy, in the course materials in a case study that you're going to see about building trust inside the organization.

## Building Trust

- Trust is based on emotion and emotions are not always based on logic and reason.
- “People want to know that you care before they care about what you know.”
- Safety is essential for trust. You need to maintain a haven for shared information and a promise of confidentiality/anonymity.



Trust is one of those things that is based on emotion. We don't have usually a fact list or check-off list in our brain about people, and add them all up and then basically give people a numerical score and say, I trust you, I don't trust you. Sometimes it is based on pure emotion, no logic, no reason, it's just some people instantly look trustable, others don't. Others you sort of have to learn to trust them. And when a person comes into an organization trying to help, one of the first things they have to do is to really establish that relationship, because in the mind of the people you're talking to, there will be always be a question about are you actually here to help me.

There is an expression that Stephen Covey, the guy who is famous for the “Principals of Effective People” came up when he used to be just a consultant. He said, “People want to know that you care before they care about what you know.” It doesn't matter if you were, in fact, the expert and you knew every right answer. Before people will listen to that answer they want to actually have a sense that you're well-meaning towards them and that you think that answer will help them and not hurt them and that you have paid attention to them as you develop that answer. So that in a sense, you're looking after them, and that's the basis of trust. People get a sense that you are, in fact, caring about them enough to pay attention to their interest and their concerns.

As you might suspect, one of the key aspects of that has to do with when people giving you information, you're taking care either to keep that confidential if you can, or if it's a really small organization to at least make it anonymous so that as people share stuff with you, it doesn't end up being used against them. An advantage, actually, that you have, since you're relatively new, is you don't have histories of relationships with people that might either work for or against you. You've kind of got a blank slate situation where you can come in, and in working with people, basically set things up on the right side of the equation, and

then as long as you keep moving forward in that direction, it's fairly easy, particularly in non-profits, where people tend to extend trust for the most part, to maintain that as long as you are careful to keep really honoring what people tell you and involving people in a way that they think really means that you're paying some attention to them.

Now, I just rattled off a lot of things really quickly because there are things inside the course material that relate back to that. But as an example of what you do to build trust in organizations, frankly, all the things we're going to talk about eventually create trust. For example, the mere fact of meeting with people to talk to them tends to establish trust because it indicates you care about them, you care about their opinions. If you do a good job of actually listening to them and they can see that in your body language and the questions that you ask them, that will tend to build trust because that shows you are paying attention to them more than just the physical meeting. It actually means mentally you are trying to link with them, learn what they know.

And if after that initial meeting you continue to come back to people and involve them, sometimes by just asking their specific opinion about something else as a follow up, sometimes about asking them to help you out, then that in itself will continue that process of building trust. So once you've started that ball rolling, people will kind of continue to judge you by the nature of the interaction, and the more involvement, the more the trust tends to actually speed up and to build historically.

Now, I went through all of those things real fast. What I want to do is stop in a moment and see if that didn't make sense to anybody or if there is kind of a thing I can fill in, because we've got people here with quite different situations for what you are attempting to do. And we've got people in very different organizational settings, which also, as you might guess, has an impact on some of this. So any questions about any of that that I went through pretty fast?

[Michelle] This is Michelle. No, it was clear to me, and I think absolutely accurate, starting with the point about -- that you made about the real-world politics and associations. I kind of had that going on from day one.

[Steve] Well I'm sorry to say, Michelle, but it's not just associations. Whether it's the church setting, whether it is inside a traditional non-profit organization, there's always a little bit or that angling, and it's human nature, so you have to sort of accommodate to it. And depending on the history of the organization and what kind of climate it has sometimes you can see places where people have been trained not to trust other people, in which case it's kind of an uphill battle to restore that sense of trust.

[Michelle] Right.

[Steve] But it's possible because basically, as I say, nice people tend to get the benefit of the doubt. So when you start it off if you look like you were trying to be nice, generally speaking, most people will respond in the same kind of way. Okay?

Now with that, let me just move to the next section here because that's simply the establishment of –

[Amy] Steve –

[Steve] Yes.

[Amy] It looks like Kristi had her hand up before you move on.

[Steve] Ah, missed that, Kristi, sorry.

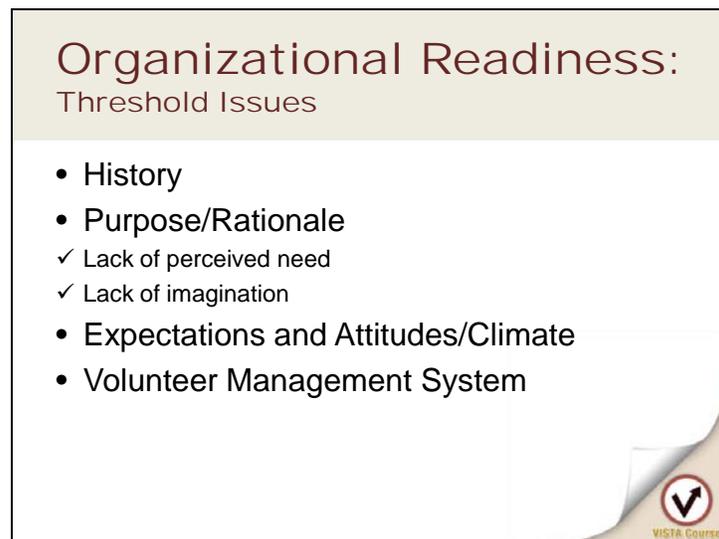
[Kristi] That's fine. I wanted to just thank you, because coming into this, there are so many different areas of our organization and there's a lot of department heads, but we focus on a ton of volunteer hours that are required. And I've felt a lot of resistance, so I wanted to thank you, because it sheds a lot of light for different circumstances and situations that I'm going to be able to rebuild and where I don't think I have gotten any distrust, I can see their resistance just because of all of the unknowns on their side that I wasn't as open to, and even, I tried to put myself in their shoes from their perspective, but I think you've helped me to clarify some of that resistance in almost a sense of some people were setting me up for failure, but all of the changes that they have gone through here in the last few years, I could see where that resistance would be.

[Steve] Yeah. It's not you. That would be the bottom line. And in organizations that have been through lots of changes, after a while, people get tired, they get paranoid, and particularly in the environment we have now, where literally everybody has too much work, even if you put an answer in front of people, they don't want to see it because that means more work. I mean they're not stupid. They know there's going to be stuff attached to that that's going to have to get done and it may fall on their plate.

So as I say, what you ultimately know is "I have to get their consent and buy-in or this will just fall apart after I leave, and I'll do what I can to do that." But in some cases it is, frankly, going to be much harder than in others.



Let me shift to talking about organizational readiness and let me show you some of the factors that sometimes can be very hard to spot. Different organizations are in a different level of readiness to involve volunteers, so you kind of have to go with a map of what's occurring in your own organization.



There are some threshold things, for example, that can impact the ability of the organization to make either new use of them, new use in a small program, or even to change what it's already doing. One is history; for example, if I'm in a program that's involving volunteers for a long period of time, we have traditional ways of doing things. Some of those were written down by Moses in stone, and changing those things requires an unbelievable amount of decision-making on the part of the organization, in part because we've got cadre of volunteers who have been there 30 years and they really like the way

we've been doing things. So when you try to get that organization to update its practices to something approaching this century, this millennium, there's a bigger fight than you think of just because there's that vast block of history that you're still dragging with you.

The history can impact in another way. If I'm in an organization and we're trying to do an outreach campaign, we've suddenly decided and looked at the demographics of the community, there's a brand new Hispanic population in town, we should be involving those as volunteers. Well, it's nice to say that and it's nice to think that, but the history of the organization in terms of what it has done in the past with Hispanics has a lot to say in terms of whether you can successfully pull that off or not. Do we have a history of working with Hispanics? Has that been successful or not? Do we have a demonstrated interest in that community such that it would respond and be interested in us? Or basically do we have nothing to stand on in terms of being connected with the Hispanic community?

The second area is what I'll call purpose or rational, which is the organization actually trying to figure out why it wants to involve volunteers in new ways or, frankly, in any way whatsoever. Commonly, organizations do a bad job of trying to upgrade their use of volunteers, partially because some of them just never perceive the need for it. Many of them don't think they ought to have volunteers at all. Some of them are okay with the way they have used volunteers for the last 20 years, even though that's mostly irrelevant to the mission of the organization. Some of them just frankly have what you can only describe as a lack of imagination, not because they're dumb but just because this isn't an area they know much about.

So a good part of organizational readiness that you'll discover is trying to find, really, a way to explain to those in the organization why this is a really good idea and why it's going to help, what impact it's going to have on the mission of the organization, and on the way that the staff go about doing their work and are successful in doing that work. So linking the volunteers to something that people will say, "Yes, that makes sense. That's a good rationale, let's keep forward with that." And most organizations, to be blunt, don't have one of those. Many organizations have volunteers because 40 years ago somebody said, "Go out, round up a small herd." They got one. They've been there since then, but they haven't really taken a look at whether that's precisely what the organization really needs.

A key element that some of you have already run into are the existing attitudes both of staff and volunteers or the overall climate of the organization, both to volunteers in general or to changing and updating the way it does business. Some of these will simply be, as I said, they're tired so anything new is an uphill battle. Some of this may be very concrete fears. In some organizations these days, there are fears about bringing volunteers in because a lot of staff have lost paid jobs, and even though we can say that's definitely not something that's

going to happen, that's still going to be a fear. People will wait and see whether that's really true and how we go about doing things.

Some of it may simply be attitudes about what volunteers can do as opposed to what paid staff can do because some organizations tend to relegate volunteers to what could only be described as lesser responsibility roles and don't trust them to do some types of things, and that's purely an act of prejudice on their part. So part of what you try to uncover are what are people's expectations and what are their attitudes, and an aspect of that that's actually critically important is asking people, "If we were to make this change, what would we need to do to make it easier for you?" Would it be additional training, additional resources, what kind would those be? So what's their attitude about -- what are they going to need in order for this to be positive for them, as opposed to negative for them?

And last -- and we'll talk about that more in a moment -- they have to need some sort of organized system for working with volunteers, and particularly, for any large effort, that needs to be something that's been thought through and put into place. And quite frankly, even in organizations that have been around for a while and have volunteer programs, there are a lot of programs operating without a good volunteer management infrastructure, so don't be surprised if you run into one from time to time.

Organizational Readiness Exercise:  
Volunteer Management Systems

- Based on your experience so far, what are the key elements for a successful volunteer program?

16

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We're going to focus on that for a moment, and let me just ask for another voice drop-in kind of thing because this is an area you guys have the experience with. Based on your experience, what do you think are the key things that have to happen in a volunteer program, the key elements or the key parts? Anybody got one?

Anne.

[Amy] Anne has her hand raised.

[Steve] Yes, Anne? Anne? Anne?

Amy, do you hear me?

[Michelle] I hear you. This is Michelle.

[Steve] Okay.

[Michelle] From what I hear, from the agencies at least, is that really the most important thing is that you match the volunteer to the right work.

[Steve] Okay. That would be absolutely correct, as a very key and, frankly, often overlooked one. Kristi, how about you?

[Kristi] Consistency.

[Steve] Yes. Any particular consistency come to mind with that?

[Kristi] Just throughout the organization. Again, with so many departments here, even though it may vary within each department, but consistency throughout the organization of how volunteers are recruited, just the processes and procedures of everything, that it would be consistent with each department head in each area.

[Steve] Yes. That would be a perfect example of one that actually is easy to identify, easy for everybody to agree to in theory, and really difficult to get different sections to change the way they've been doing things so that they're more consistent, because everybody tends to like their way, and sometimes it's not too happy. But as you say, volunteers will notice differential treatment, and quite frankly, they won't like it after a period of time.

Anne, we're trying to link you into this.

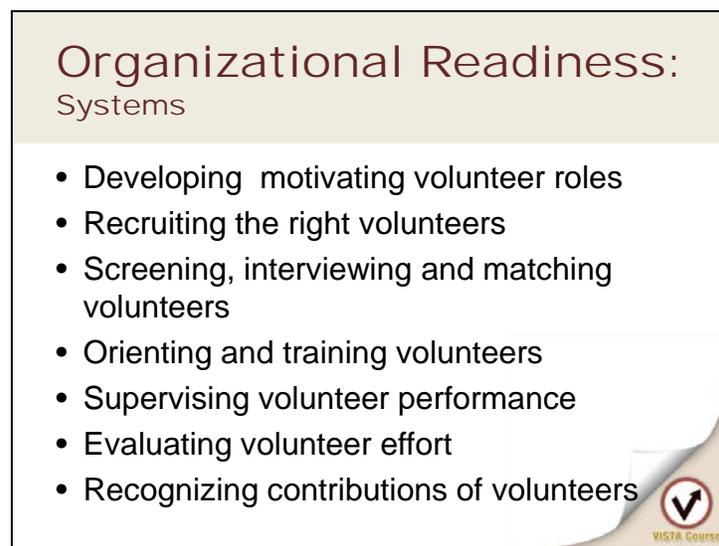
[Erich] Well, Anne, I was just going to say if you can't hear, you could already send it in via the chat as well, your comment or question. Michelle's hand is back up, but how about Hailey or Jennifer, did either one of you want to say something?

[Unidentified participant] I guess like based on our experiences here, our volunteer program manager and supervisor has really emphasized tasks, like having specific tasks for

volunteers, so they'll bring a volunteer in but it might not be organized well enough, so that the volunteer knows exactly what they're doing.

[Steve] Yes. A common failing, as you say, a key thing, because if the volunteer doesn't know what they're supposed to do, it's a lot harder for them to actually do it successfully. And it's amazing how many programs actually make the mistake of recruiting first and then thinking about what they want the volunteer to do later, usually after the volunteer is a bit disturbed about sitting around while somebody comes up with what the notion is.

Okay. All of those are perfectly correct good answers.



The slide features a title 'Organizational Readiness: Systems' in a dark red font. Below the title is a bulleted list of seven items. The slide has a light beige background with a white box containing the text. A small logo with a checkmark and the text 'VISTA CENTER' is in the bottom right corner.

### Organizational Readiness: Systems

- Developing motivating volunteer roles
- Recruiting the right volunteers
- Screening, interviewing and matching volunteers
- Orienting and training volunteers
- Supervising volunteer performance
- Evaluating volunteer effort
- Recognizing contributions of volunteers

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In the course materials you will actually see a long list of all kinds of things that those fall into. As either Hailey or Jennifer, I forget which, just said, it all starts with actually having roles -- work that volunteers will actually want to do, and then finding people who actually want to do those, going through the screening and the matching process to make sure that we put somebody in the role they actually are willing to perform, actually happy to perform, and have the ability to perform, and then all the way through training, supervision, evaluating, recognition, sort of the keys in all of that kind of stuff.

- Depending upon the size of the organization and the type of volunteer effort *how* you do each of these may vary widely.
- Generally speaking larger systems require more bureaucracy and standardization.
- In smaller systems things often happen in a “decide as you go” fashion.



Now the truth is -- and those of you who are inside organizations that already have volunteer programs have already seen this -- depending on the size of the organization, the type of the volunteer effort, even inside a big organization with different volunteer programs, the size of that sub-effort, how you do each of those can vary widely. They may be something that is done on a fairly casual basis. If all we do is involve volunteers in a fund raising event once a year, that's a very different kind of thing. If I'm in association when I'm actually dealing with what are more people who view themselves as members not as volunteers sometimes for the role they're portraying. That's a different kind of thing. So you sort of adjust those to really what you got, and what people are trying to do.

In larger systems it's actually smart to have more bureaucracy and standardization. To go back to what was said earlier, you'd like to have common practices across the organization because that looks like it makes more sense to the volunteers. We're being treated the same way, we go through the same processes, we have the same abilities, we have the same rules to live by, so we don't have to keep thinking of things in different ways.

And it's fairly common in organizations for volunteers to be involved in different kind of ways, so you can imagine how confusing it is for them to end up having to follow one set of rules in one project, a different set of rules in another project, and an entirely different set of rules someplace else. Not a good way to motivate people to want to be involved in things.

If I'm in a smaller system, quite often, and sometimes quite successfully, we just make things up as we go along. We'll have very loose rules, very loose systems because we're small enough where, basically, that works. We got a group of people who can get together, everybody will be up to speed on what's happening, help decide what's happening, and then they'll do it out there. But rule of thumb, the bigger it is, the more somebody has to do

the fine-tuned planning and all of that. Okay? So all that structural stuff gets adjusted to the size.

One other increasingly important item:

- Internet capacity and sophistication



There are two other elements I want to mention briefly that are critical these days, one is Internet capacity and some sophistication on the part of the staff. And the bad news, which some of you have actually already discovered in your organization is that many non-profits aren't computer savvy and are actually suffering because potential volunteers are far more savvy and have much better equipment than the organization does, and that's a thing that has to change, otherwise there are going to be some big problems, because that Internet capacity, in particular, is the way people link to the world these days.

In all cases:

- Someone has to assume responsibility for thinking about and managing the volunteer effort.

- ✓ FT/PT coordinator of volunteers
- ✓ Staff person with other duties
- ✓ Management volunteer



The other thing is that we have to make sure that somebody continues to pay attention to managing the effort. Somebody has to assume responsibility for thinking about the volunteer effort and paying attention to it. Now, there are lots of options to that. Many organizations have full-time or part-time coordinators of volunteers. That's what they do. More of them probably have a staff person who has lots of other duties, but part of that is, in fact, managing whatever they are doing in the volunteer effort as part of those duties. A fair number of organizations these days have volunteers who help manage the volunteer efforts inside the thing. The only alternative that isn't good is you being talked into being the manager of volunteers for the effort on an ongoing basis, but that's not part of what your role is supposed to be, so push them to increase capacity so that someone can do these kinds of things. Okay?

## Working with Staff

- The most effective method is simply talking with staff to gain their input.
- In-person interviews gain more information than written surveys; you can mix the two in a large setting.
- This is the same kind of interviewing that is done with prospective volunteers.



Now as you are doing this, working with staff, as I said, is a method, and the easiest way to do that is simply talk to people, go around, have as many conversations as you can formally or informally and ask people for their opinions about how things could be done. Doing that in person works better than doing that as a written survey, but if you're in a really large setting, you can mix the two. But in person is a great way of getting to know people. And this is actually a nice skill to acquire because it's the same kind of interviewing that you do with prospective volunteers, where you're trying to get to know them, trying to figure out what would work with them, trying to, in the case of a volunteer, find a role they like, while in the case of staff, trying to find a way that volunteers might help them as you do.

## Quick tips on interviewing

- Interviewing is about gathering information:
  - ✓ Facts
  - ✓ Descriptions
  - ✓ Opinions
  - ✓ Ideas
- The more you talk the less you learn.



And I'm going to run over some very fast things about interviewing here for those of you who haven't ever done this kind of thing, and as I say, those of you who have done before chime in when we get to the end of these things. One is, interviewing is really just about gathering information, but it's about gathering all kinds, all shapes, all sizes. So you get facts, you get descriptions, you get opinions, you get ideas, you get this mix of things, and that's actually quite good.

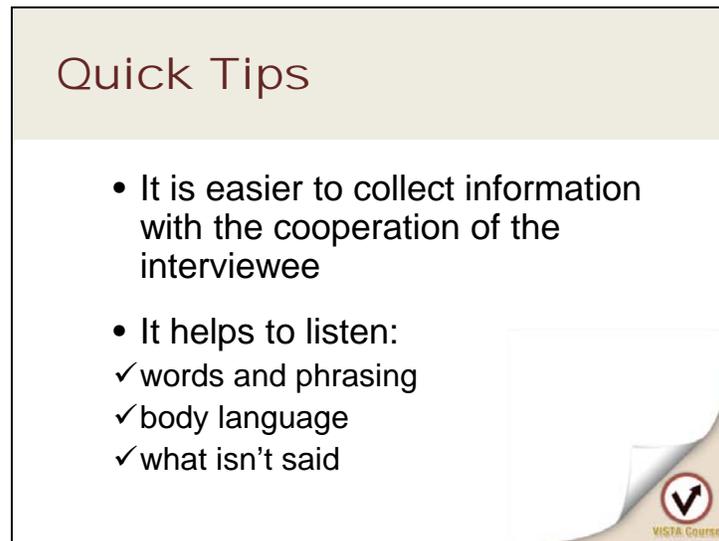
The key rule in interviewing is you want the other person to talk and you want to listen, because the more you talk the less you're likely to learn. So it's an opportunity for them to show how smart they are, not for you to show how smart you are. You get to do that later on. Okay.

## Quick Tips

- You can collect better information if you have a plan:
  - ✓ Preliminary questions
  - ✓ Individualized follow-up
  - ✓ Second round



As you do the interviewing, it's helps to actually have a plan, to have a set of questions you start with that you're planning on asking everybody, to, as you talk to people, ask them individual follow-up questions that pertain particularly to them. And most often, if you got the opportunity, as you will, to go back and chat some more later on. So we'll keep filling in the blank and interviewing people for all of that kind of thing.



**Quick Tips**

- It is easier to collect information with the cooperation of the interviewee
- It helps to listen:
  - ✓ words and phrasing
  - ✓ body language
  - ✓ what isn't said

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A subtle rule that is obvious when you hear it but is easy not to do is to remember that you'll only learn stuff with the cooperation of the person that you're interviewing. So they've got to be willing to talk to you, and that means things as simple as at the beginning of one of these confirming that it's a good time to talk. And if it's not a good time to talk, say, "Well, let's -- let me come back later when it's easier for you," because that will show that you care about them.

You also can get cooperation by showing people that you are listening. And if you ever take one of those active listening classes you see exactly what this is all about, paying attention to their words and their phrasing, paying attention to their body language, sometimes paying attention to what they don't want to talk about and squirm a little bit when you get on that subject, and confirming that by asking them follow-up things that shows you heard them and shows that you're actually thinking about what they said and evaluating it.

## Quick Tips



- Record what you gather – after 3 interviews things get muddled.
- Try to make up your mind as slowly as possible.



I don't know about you, but if you're doing many of these, after a while I can't remember who said what about whom, so I like to write things down and sometimes I'll write them down during the interview, after I ask people's permission. Sometimes I'll write things down after the interview, before I lose track of them. But you try to record stuff, particularly the good ideas, before they get lost, which is really easy to do.

The last tip in interviewing is one that is actually very, very difficult to do, and it's the rule of trying to make up your mind as slowly as possible. An easy thing to do, particularly those of you who have supervisors or have staff people you're working with who are dynamic and look like they know what they're doing, is talk to them first, get a firm idea of what they're interested in, and then no matter who else you talk to, you filter that subsequent stuff through the first person's opinions that shaped what you are going to pay attention to. And that's incredibly dangerous because it means you'll look like you do a good job in that person's mind, but everybody else will notice the difference between what they told you and what seems to be coming out the other end. So what you try to do is think slowly so that only after you've collected as much information as possible do you try to mesh it all together and come out with something. And you particularly try to make sure the first person isn't the one who totally shapes what I hear after that initial kind of discussion with that kind of person.

I did those real fast. Those are pretty simple.

## High-Impact Volunteers



We've got one last section that I want to get to pretty quickly here as we do this, and that's just to make a comment about high-impact volunteers and how they fit into this.

## Nonprofits and Business

- The Attila the Hun Approach



One of the key things we're trying to do in volunteering these days is kind of change the notion that non-profits have about how businesses can help them. Typically non-profits have kind of viewed businesses as a place they could kind of loot and pillage, kind of what we call the "Attila the Hun" approach.

## High-impact volunteers

- Their volunteer work is predicated on existing skills or expertise possessed by the volunteers, and is, in fact, the focus of the work done by the volunteer
- Their work is done more as a consulting project with agreed upon guidelines, deadlines and deliverables than as an ongoing contribution of time
- Their work often focuses on improving the management or infrastructure of the community organization



But, increasingly, we're trying to get them to focus on thinking about ways that people inside businesses, both big businesses and small businesses, and actually when business scales to really change the way volunteers operate.

And high-impact volunteers, as they're referred to, as opposed to this sort of traditional service volunteers that most agencies utilize these days, have a couple of different characteristics. One is the volunteer work is actually based on skills and expertise that the volunteers already have and are going to bring to the organization, and that's the focus of what the volunteer is going to be doing, not some of the other stuff we've had volunteers doing for years.

Most often that work is shaped differently. Most current volunteer work is shaped as an ongoing permanent kind of relationship. The new stuff is shaped as a project, which has guidelines, deadlines, deliverables and has an end date. And perhaps most of a change, the work of the volunteer focuses less on the client and more on improving the management capacity of the organization, building its infrastructure, building its ability to do things and improve.

## Some data:

- 32% of non-volunteers 55+ would prefer a volunteer activity that helps them learn new skills or explore new interests
- Among corporations surveyed, 41% believe skilled, pro bono volunteering is the best way to assist grantees in achieving their goals.
- Only about 19% of volunteers say their workplace skills are the primary service they provide when volunteering.

29



We know a couple things about this. We know that most volunteers would prefer work that is structured this way; that's around their skills. We know that most corporations would actually prefer to have their volunteers doing this kind of thing. And we also know, unfortunately, that most organizations don't work this way. Only 19% of the volunteers think their workplace skills have anything to do with what they're doing as a volunteer, which is a big mismatch.



There are a ton of organizations now out there that are basically designed to help people find these high-skilled volunteers, and when I do the thing on recruitment, I'll come back to these. So there are lots of easy ways to connect with this that, unfortunately, most non-profit organizations don't know about.

Thought Exercise: 

- Suppose your nonprofit was only allowed to have 5 volunteers.
- Your job is to ensure that you get the most from that small group.



Let me, for the purposes of what you're going to be doing as you interview staff next week, just give you a way to think about this. We tend not to think about volunteers in a rational kind of way. A rational way of thinking about volunteers would be to view them the same way we view budgeting in an organization. In budgeting you basically say, "We've got \$100,000. Where can we put it so it does the most good? What can we spend it on so that we get the most return?" Now, you could think about volunteers the same way, as an investment. That people have given X amount of time, we've only got the ability to manage so many of them. What should we have them doing and what should we be spending our resources to manage them doing that generates the greatest return?

Consider:

- What could they do for your organization that would be **most helpful**?
- How could they improve the **functioning** of your organization?



So a nice thought exercise to run by people is if you could only have five volunteers and you wanted to get the most from those volunteers, what could they do that was most helpful for

the organization, and how could they really improve the functioning of the organization over the long run? And that's something you might actually run by people as you're interviewing because that in itself is a good way of focusing on high-end projects.

## Catchafire Open Projects

- Website design
- Social media plan
- Board member search strategy
- Event publicity
- Market research
- Video editing
- Logo design



An example of some of the things that might show up -- this is from the Catchafire matching group of the kind of open projects it's soliciting volunteers for right now -- website design, social media planning, board member search strategies, event publicity, market research, video editing to upgrade PR materials, logo design, really concrete kinds of stuff that you can see.

## Taproot Foundation

- If those volunteers provide **one hour of hands-on volunteering**, the value to non-profits would be **\$108 million**, based on the Independent Sector's advised rate of \$19.51 an hour.
- If those same volunteers applied their **professional skills** and resources to help nonprofits – valued at an average consulting rate of \$200 an hour – the value to the nation's charities would be closer to **\$1 billion**.



We actually know that one value of this approach is that the kind of assistance those volunteers would be rendering is a heck of a lot more valuable in monetary terms than what many of them would otherwise be asked to do, probably on a ten to one ratio.

## CNCS

- For volunteers in almost all of the eight occupational groups, the retention rate is higher when people use their skills while volunteering compared to when they do not. Within two of those occupational groups, the difference is significant: **volunteers who use these skills at their volunteer assignment are more likely to continue serving the next year than volunteers from the same occupation who do not.**



And we equally know from retention statistics that if we can involve volunteers in utilizing their skills, they're twice as likely to stay with the organization, and that is a really good thing to be building people towards. Okay?

## Last Advice

- Quality not quantity
- A small success is better than a large failure
- Under-promise; over-deliver
- Leonardo da Vinci: Avoid experiments the results of which die with the experimenter.

36



Last quick couple of items of advice: One is key rule in volunteer programs is that quality is more important than quantity. If you create a quality experience, quantity automatically happens. If all you do is focus on numbers, what will tend to happen is things won't work well, and things will not be high quality, and that will ultimately reduce the quantity. To me,

a small success is better than a large failure. So if you can find something useful to do, even if it's a little thing, talk the organization into doing that. You should feel good about what you have been able to accomplish.

A nice rule to use as you go along is to low ball people in terms of what your expectations are. Nobody's ever disappointed if the product at the end is better than they thought it was going to be, so under-promise, over-deliver. And my favorite piece of advice is from Leonardo de Vinci who once said, Try to avoid experiments, the results of which die with the experimenter. What happens in your assignment shouldn't require your death or much pain on your part, so try to be careful in what you're doing, and involving people is a great way to make it a safer experience for them and for you.

Now, I did that fast. Once again, if we unmute for questions or observations about that. That's kind of a big-picture overview of what I think most of you are going to be involved in.

And I'm patient. One of you will break under the pressure and actually say something.

Michelle.

[Michelle] I'm breaking. No, I just want to say thank you. I think overall the presentation was great and relevant to my work and informative, and that's it.

[Steve] You will find more stuff in the course materials. Thank you, Michelle. Anybody else have either a comment or a question, because there are lots of things we have not covered over today.

[Kristi] I have a question.

[Steve] Yes.

[Kristi] Do you have any suggestions? One of the things that I have seen, this organization particularly, fall back on the most, and one of the struggles I have, is we seem to be a key organization that, like, a lot of the probation officers will send individuals that are dealing with like community service, and so obviously they're here for an agenda, here for a short period of time. Now a lot of our department heads rely on that, knowing that somebody else is going to be right there, but they've never -- you said the infrastructure, like it's there, but the organization -- the volunteer program is here but there's no infrastructure because they've always had that as a fall back.

[Steve] Yes. And they never had to make use of it because they had sort of an automatic -- well, for lack of a better word -- slave system.

[Kristi] Absolutely.

[Steve] For people who didn't have any choice. What most of us are doing these days with those kinds of efforts are separating them off from what we'll call a true volunteer program, and say, just keep doing that, but let's not confuse it with a volunteer program because that's not what those people are. That's a community service thing they are doing as a requirement. If you want to have a volunteer program, let's go back to talk about what's necessary to do that, which are all of the elements out there.

So if I were you, I would try to separate, in their minds, what they have been doing with that population from what you want to do with a new group of real volunteers who have a choice about whether they are involved with the organization or not, because the two really are different, and mixing them, they have different motivations. They have all kinds of differences that really make them too dissimilar to put in the same pot, so does that make any sense?

[Kristi] Oh, absolutely. On a second side of that, you made the comment about the volunteers that have been here for -- we actually have some volunteers that have been in our organization for 40-plus years. Coming in, I was actually a volunteer before I was a VISTA at this organization, and I was very unaccepted. I was very -- like, there was walls that were obvious between those volunteers and new people coming in.

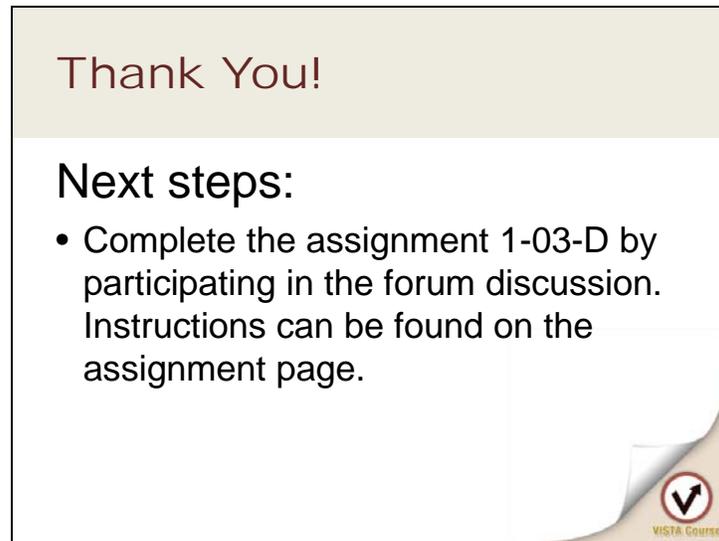
[Steve] You may also discover that you can use the same tactic in dealing with that group. It's not uncommon for organizations who have that really old cadre of dinosaurs to just say, we're not going to mess with them. They can keep doing what they're doing the way they've been doing it, but we'll create another volunteer program for younger people or for this other type of population, and we'll build that program around those because they're the future.

[Kristi] Okay.

[Steve] And politically that's an easier thing for people to do, and it still honors the contributions of that group of long-term volunteers.

[Kristi] Absolutely.

[Steve] But it doesn't make those people change. And as you say, they can be an absolute barrier. So if I were you, I would avoid a fight, and the easiest way is to just say, "Okay. We'll do it two different ways from now on, one for you guys and one for the new people that are coming in."



Thank You!

**Next steps:**

- Complete the assignment 1-03-D by participating in the forum discussion. Instructions can be found on the assignment page.

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Okay, I need to hand the ball back to Amy. So, Amy, over to you.

[Amy] Okay. I went ahead and grabbed it from you, Steve.

[Steve] Okay.

[Amy] And I just wanted to say, we're at noon our time, so our hour is up. But if folk have other questions and you guys are willing to stay on the line, I feel like let's do it. Let's answer questions or have discussion. If you need to go, you can go ahead and sign off. But if there's other questions, I think you have Steve here and you might as well ask as many questions as you have.

[Michelle] Okay. Well, I'm going to hang up, but again, this was great. Thank you.

[Steve] Thanks, Michele.

[Michelle] Okay. Bye.

[Amy] Any other questions or comments or reflections that you guys want to share before we formally end the presentation?

[Kristi] As far as resources, the materials that we were supposed to read prior to the webinar, do you have any suggestions for -- as far as resources for volunteer management programs that we would want to suggest to our organization?

[Steve] If you haven't seen it, there is one website that is sort of the mother of all repositories on information in this, because all of us consulting guys throw stuff on it. It's [www.energizeinc.com](http://www.energizeinc.com) (one phrase) and it's where you will find links to everything.

[Kristi] And that was just [www.energizeinc.com](http://www.energizeinc.com)?

[Steve] Yes.

[Amy] And I would also, too, just put in a little bit of a plug for the VISTA Campus where there's a lot of different types of resources, materials that you can use for putting together your volunteer program.

[Kristi] Yes, I've used that quite a bit. As far as software was concerned for management, was specifically what we were looking for.

[Steve] On the Energize site -- well, if you just want stuff on volunteer management software, do a search under "Jayne (J-a-y-n-e) Cravens (C-r-a-v-e-n-s) volunteer management software." Jayne actually keeps a somewhat updated list of the packages that are out there with some interesting opinions about what's good and what isn't. And you will see another --

[Amy] Can you spell that one more time for us, Steve?

[Steve] Yes.

[Amy] I wanted to put it in the Chat panel. Jayne's name was -- spell it one more time.

[Steve] Jayne, J-a-y-n-e, Cravens, C-r-a-v-e-n-s, volunteer management software. Or if you go to the Energize site there's also a list on that of the packages that are available?

[Amy] Great. Any other questions or comments from folks? So hearing none, I think we'll go ahead and wrap things up. I just want to thank Steve for his excellent presentation, and also thank Jen and Hailey and Kristi and Anne and Michelle for being here on the live webinar. We really appreciate having you here, and we're glad we had an audience.

So the next steps are posted on the screen for you guys around this assignment, and as always, you can contact Erich and I via e-mail through QuickMail, or join us on Friday, tomorrow, for Office Hour. We really appreciate you guys, and we're looking forward to seeing how things turn out for your assignments this week.

So thanks again, Steve. Thanks, everyone. We're going to go ahead and sign off.

[Steve] Thanks, guys.