

End-of-Year Reports Can Illuminate Volunteer Achievements

Susan J. Ellis

To prepare for consultations and training sessions with clients, I often ask to see annual reports and other formal documents provided to funders, donors, and the government as an overview of the organizations' performance. And I am almost always disappointed at the way in which volunteer involvement is barely mentioned. Just last week I read a "State of the [*Organization Which Shall Remain Anonymous*] Report 2012" for a very well-known charity that frequently claims to engage "millions" of volunteers. The report was 62 pages in length and the word "volunteer" was mentioned a mere 16 times – almost always in a phrase pairing it with employees, as in "our staff and volunteers," or in the context of board member volunteers. Not a single sentence was devoted solely to any activity or service provided mainly by frontline volunteers. Further, the word was totally absent from any financial data (including no mention for expenses incurred to support the work of volunteers).

The invisibility of volunteers in many agency reports is matched only by the presentation of generally useless information about volunteers in other reports. It's as though executives, public relations experts, and accountants suffer from collective brain-freeze when describing their organization's work. What else can explain the missed opportunity of shouting proudly to the world about a major group of supporters, vital both to client services and to the bottom line?

It's up to the leader of volunteers to educate up on this subject. Maybe you can make it an exciting end-of-year, happy holiday message – which is why I am focusing on this in the December Hot Topic.

What You Know that Others Don't

Without "blaming the victim," the problem of invisibility often starts with inadequate monthly reports from the volunteer office. Just because no one has asked you for more data does not let you off the hook from providing insightful information top management needs to understand the volunteer workforce. I contend that providing regular, *useful* reports that spotlight volunteers is one of the most important roles of the volunteer resources manager. Even if it takes time and even if you don't much like writing them (but you can always recruit a "volunteer assessment team" who actually enjoy the process of collecting, analyzing, and reporting data).

If you report throughout the year on key statistics, it becomes comparatively simple to cull out the most vital data for an annual or year-end report. You can provide consistent overview information each time, but every month you can also highlight a different aspect of volunteer involvement in more depth.

The point is to dig down a bit, revealing more about what statistics mean in daily practice. Not only will this open everyone's eyes about the amazing work force operating under the radar, but it will

also underline why the volunteer office more than earns its budget (and maybe should get *more* resources).

Remember that no one but you sees the entire picture of volunteer involvement and knows *all* the volunteers. Why keep the secret of who they are and what they do? Below I suggest several levels of data analysis that could be reported to change everyone's perception and understanding of volunteer contributions.

Who the Volunteers Are

Demographics: Ages, gender, race and other ethnic diversity – possibly comparing the volunteer data to the same information for your paid staff or, more critically, for the clients or public you serve. Also, is there geographic representation of all the locations you serve? What foreign languages do volunteers speak?

- Is this diversity something that should be spotlighted as showing the range of your organization's supporters?
- Has this data remained the same for a long time? Are you recruiting different types of volunteers recently? Intentionally or surprisingly?

Education and professional expertise: What is the education level of volunteers (particularly how many have advanced degrees)? What occupations are they currently in or have they retired from?

- Does this make the volunteer workforce an extension of the paid staff or a special skills group that expands the knowledge base and abilities available to the organization? Many volunteers are *professionals*, even if in an occupation different from the employees of your organization.
- Again, is this changing over time? Intentionally?

Affiliations: Many volunteers will come to you individually, but others come through various corporations, faith communities, civic and service clubs, schools and other community organizations. Find ways to report this very important collaboration component of volunteer services.

Their relationship to your mission: Are they personally affected by the cause, disease, or focus of your work (often in a way not necessarily true of employees)? Were they, or members of their family, clients of your services? Successful graduates/alumni?

- Can you capture these personal stories in a way that shows why volunteers are dedicated and also how important the work of the organization is to many?

Their role as or interrelationship with financial donors: How many volunteers are money donors as well as time donors? How many money donors are also volunteers? This of course assumes you have access to the donor data, which is rare for the leader of volunteers. You need to make the case for why it is vital to compare the lists at least annually. And point out that it's important to look at family names or shared addresses, as one member of a family might write a check and therefore be

recorded as a “donor,” while other members of the family might give lots of volunteer time, which goes unnoticed by the development office.

- What is the financial value of unreimbursed expenses incurred by volunteers on behalf of the organization? (Paid staff can recoup out-of-pocket costs such as transportation to a conference, purchasing an item for a client, buying supplies for a class, and so on, so those are on the organization’s balance sheet. The additional contribution made by volunteers who spend money on your behalf without recompense is not captured on any ledger unless you report it somehow.)
- Have volunteers donated items or in-kind services – or successfully solicited donations – that allowed the organization to spend money elsewhere? Think party or holiday refreshments and decorations, auction items, sales of ads in a program book, or supplies that come from a volunteer’s family business. (An art center client had a board chair who owned an electrical company and donated all the light bulbs used each year for five years. She was thanked, but the gift was not recorded in the financial records, effectively underrepresenting the cost of running the center annually and underreporting financial support raised.)

Note that I have not included hours served or longevity/retention. No problem if you report those, but they are pretty meaningless without lots of information about what those volunteers are *doing* while they spend their time in service.

What Volunteers Do

Basic service categories: Make sure that you regularly describe all volunteer positions that are ongoing, and don’t assume “everyone knows.” They do not.

- Be specific, listing all roles and projects underway in each unit.
- Highlight those that are part of *primary* service delivery to clients.
- Point out what volunteers do that no one else would do otherwise (value-added).
- Explain how the work of volunteers frees paid staff to do the things that most deserve employee attention and training.
- Note which volunteer assignments are adapting in what ways to new client or staff needs.

Special, episodic, on-call services: The volunteer office responds to all sorts of unexpected requests, from carving the Halloween pumpkins to guiding that group of Vietnamese visitors around the facility. Record those services and report them, as well as seasonal activities (Christmas caroling), one-time group work (garden clean up), and even those five volunteers rotating being on-call each weekend, whether or not they need to come in.

- While you might recruit new volunteers for special activities, often you will tap volunteers in ongoing service to handle an unusual request. Be sure you record such contributions in their individual files, but periodically note how many volunteers do such extras.

Where/how volunteers work: It's a misconception that most volunteers work on-site, on a regular shift of duty. Clarify what volunteer work is done off-site, in the field, in client homes, virtually via computer and Internet, or anywhere a volunteer chooses. This may even expand your volunteer demographics, as online volunteers could reside anywhere in the world.

Celebrate the Holidays with Surprising Facts

I suspect readers will see all the serious uses of the sort of data and analysis I've just suggested. But it's the holidays, after all, and I challenge you to find ways to incorporate surprising information in all your messages as you end 2012 and start 2013. Here's my starter set:

- Design a greeting card to look like a scroll and head it *24 Surprising Facts about What Volunteers Have Given Us this Year*; then list any of the information just described above. Distribute it as widely as possible.
- Rework the words of Christmas carols, Chanukah and Kwanzaa songs to praise volunteers. Example: *On the first day of Christmas, volunteers gave to us...their priceless talents and skills. On the second day of Christmas, volunteers gave to us...two successful auctions and....* Get a group of employees to sing the songs at all parties during the month.
- Add a line under your signature in all your e-mails (and update it weekly) sharing factoids such as: *Did you know that our organization's volunteers speak 14 different languages?*

OK. It's your turn. How can you find factual-and-fun ways to celebrate volunteers at this holiday season?

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