

Strategic Volunteer Management: Expanding Your Organization's Brain

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A few years ago during a workshop I led in Perth, Western Australia about being strategic in engaging volunteers, a participant came up to me during the morning break. He excitedly told me, "I just got it! Volunteers can expand my organization's *brain!*"

I love that metaphor. He had made the leap from considering volunteers as unpaid helpers recruited to assist staff into seeing them as a core asset in leading the organization towards its goals.

On the other hand, a few weeks ago I was introduced to a top executive of a major healthcare system – just before he and I were to serve on a conference panel together. He said that his multi-hospital network had thousands of volunteers and, "We couldn't do it without them." I asked him a few questions to learn how those volunteers were important, but he stopped me with, "In all honesty, we've never really developed a strategy about involving them." I queried why to which he answered (and he wasn't a bit embarrassed to tell me this), "Well, we have many other priorities."

What Is a "Strategy"?

The *Encarta Dictionary* defines *strategy* as "a carefully devised plan of action to achieve a goal, or the art of developing or carrying out such a plan." The term is also used for conducting a military campaign and, in biology (evolutionary theory), as "a behavior, structure, or other adaptation that improves viability." Wouldn't a strategy therefore seem essential to leading an organization?

Having volunteers is not a strategy, nor is having more next year a meaningful goal.

The problem in volunteer management is not that our organizations are without strategies of various sorts; it's that volunteers are not naturally integrated into those strategies even as an operational tactic. They appear on the horizon long after making plans, as extra participants in the work to be done and possibly only tolerated in that limited role.

What Might a Volunteer Involvement Strategy Look Like?

Maybe there would be more integration of volunteers into strategic plans if we offered some examples.

It all begins with an expanded vision of who volunteers are (or might become). So let's go back to our Australian colleague who now understands the potential of volunteers to expand his organization's brain. With that perspective, he might develop any number of practical strategies, such as:

- To expand our knowledge and experience base, we will intentionally recruit volunteers who are as different from the paid staff as possible, and we will seek the ideas and opinions of those volunteers *because* they have many different points of view. (And we will avoid the tunnel vision that comes from similar people with similar training discussing needs they alone have identified.)
- We will include volunteers from as many occupations and professions as possible so as to establish radiating networks of contacts throughout the community. (This will help us to publicize our work more broadly and even raise more money from new sources.)
- We will ensure that our volunteer corps represents the demographics of our clientele (age, ethnicity, gender, income level, where they live, etc.) so that we can get immediate feedback on all our activities from a perspective most like those we serve. (In turn, we will invite one or more volunteers to sit on any planning team we form.)
- We will create volunteer roles to expand our programs in different ways, perhaps to offer weekend and evening hours, serve remote geographic locations and in different languages, initiate online services, or other adaptations that help our clients and also match the abilities of new volunteers we can then invite to participate.

Eradicating Silos

The healthcare system administrator spoke of greater priorities because volunteers just don't seem important enough next to pressing concerns, especially fundraising. But what if an organization expanded its concept of finding resources into building and growing a community of active, long-time supporters? Then strategic planning would logically proceed through these steps:

- We will enlarge our definition of "supporters" to include the full continuum of ways members of the community can get involved with us and become loyal to our work. This includes anyone who: gives us money, time or talent; becomes or was a client or consumer of our services (or is a family member or good friend of someone who is); participates in our programs in such ways as joining as a member, visiting our site, attending a performance, etc.; or is a vendor from whom we buy goods or services.
- We will acknowledge and value all these roles, recognizing that people might be in more than one relationship with us at a time, or can move from one to the other, over the course of many stages of their lives. We will expand the concept of "cultivation" so important in fundraising to our behavior with all the people who come in contact with us.
- Therefore, we will first make sure all these people have an extraordinary experience when they interact with us so that they will indeed want to make a commitment to join our efforts.
- Further, we will take steps to help everyone learn as much as possible about what happens in our organization and also what our challenges are (causes for which we fight, need for financial resources, etc.). So we will pay special attention to our communication with all supporters, keeping them all updated with consistent messages in a welcoming tone.

- We will ensure that all departments work together in inviting all supporters to demonstrate their backing by giving money *and* by getting involved with us in other ways: volunteering in a range of activities; influencing legislators; spreading the word about new initiatives; finding in-kind resources for out-of-the-ordinary needs; attending special events – and more.
- Because this community of supporters is so vital to our long-term sustainability, we will track our success in accomplishing all of the above, assign and train staff to lead the effort, and designate someone in senior management to represent the effort in all future strategic planning meetings.

If Nothing Else...

Very few organizations are apt to go from no volunteer involvement strategy at all to the elaborate plan I've just fantasized! But there are elements here that can be slowly added over time, providing someone intentionally tries to introduce them.

There is one approach, however, that can happen quickly. Go to any organizational document that includes long-range planning statements and add a strategic role for the right volunteers to each one. Here's the thought process:

- Our goal is to do/accomplish_____. The role of paid staff in tackling this goal is _____. The role of volunteers in achieving this goal is _____.
- Can paid and volunteer staff already on board do these activities? Will we need more or differently-skilled employees or volunteers?
- Which part of the work will need money? How can we make that money go further by seeking donated talent and goods?

It's pretty straightforward and reasonable. It should become routine to incorporate volunteers and other donated community assets consistently into all strategic planning. Doesn't this make the case for volunteer involvement becoming a priority for any organization that wants to achieve its goals?

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