The Volunteer Management Handbook
Second Edition
Leadership Strategies for Success

Edited by Tracy D. Connors

+WEBSITE
To Faith Raymond Connors,
my beloved “volunteer
resource manager” for over 50 years
# Contents

<table>
<thead>
<tr>
<th>Preface</th>
<th>xiii</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PART I</strong></td>
<td>VOLUNTEER RESOURCE PROGRAM ASSESSMENT, ANALYSIS, AND PLANNING</td>
</tr>
<tr>
<td></td>
<td>1</td>
</tr>
<tr>
<td><strong>ORGANIZATIONAL ASSESSMENT AND PLANNING</strong></td>
<td></td>
</tr>
<tr>
<td><strong>CHAPTER 1</strong></td>
<td>Volunteer Models and Management</td>
</tr>
<tr>
<td></td>
<td>3</td>
</tr>
<tr>
<td>R. Dale Safrit, EdD</td>
<td></td>
</tr>
<tr>
<td><em>North Carolina State University</em></td>
<td></td>
</tr>
<tr>
<td>Ryan Schmiesing, PhD</td>
<td></td>
</tr>
<tr>
<td><em>Ohio Community Service Council</em></td>
<td></td>
</tr>
<tr>
<td><strong>CHAPTER 2</strong></td>
<td>Volunteer Demographics</td>
</tr>
<tr>
<td></td>
<td>31</td>
</tr>
<tr>
<td>Harriett C. Edwards, EdD</td>
<td></td>
</tr>
<tr>
<td>R. Dale Safrit, EdD</td>
<td></td>
</tr>
<tr>
<td>Kimberly Allen, PhD</td>
<td></td>
</tr>
<tr>
<td><em>North Carolina State University</em></td>
<td></td>
</tr>
<tr>
<td><strong>CHAPTER 3</strong></td>
<td>Preparing the Organization for Volunteers</td>
</tr>
<tr>
<td></td>
<td>55</td>
</tr>
<tr>
<td>Jeffrey L. Brudney, PhD</td>
<td></td>
</tr>
<tr>
<td><em>Cleveland State University</em></td>
<td></td>
</tr>
<tr>
<td><strong>DIGITAL A</strong></td>
<td>(<a href="http://www.wiley.com/go/volhandbook">www.wiley.com/go/volhandbook</a>)</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Volunteer Management of Governance Volunteers</td>
</tr>
<tr>
<td></td>
<td>A.1</td>
</tr>
<tr>
<td>Keith Seel, PhD, CVA</td>
<td></td>
</tr>
<tr>
<td><em>Mount Royal University</em></td>
<td></td>
</tr>
<tr>
<td><strong>CHAPTER 4</strong></td>
<td>Shaping an Organizational Culture of Employee and Volunteer Commitment</td>
</tr>
<tr>
<td></td>
<td>81</td>
</tr>
<tr>
<td>Judith A. M. Smith, DM</td>
<td></td>
</tr>
<tr>
<td><em>HandsOn Jacksonville, Inc.</em></td>
<td></td>
</tr>
</tbody>
</table>


OPERATIONAL ASSESSMENT AND PLANNING

CHAPTER 5 Maximizing Volunteer Engagement 103 Sarah Jane Rehnborg, PhD Meg Moore, MBA University of Texas at Austin

CHAPTER 6 Assessment, Planning, and Staffing Analysis 125 Cheryle N. Yallen, MS CNY Enterprises Barbara K. Wentworth, MS

CHAPTER 7 Policy Development for Volunteer Involvement 149 Linda L. Graff, BSW, MA Linda Graff And Associates Inc.

DIGITAL D (www.wiley.com/go/volhandbook) Options for Volunteer Involvement D.1 Bryan D. Terry, PhD Amy M. Harder, PhD Dale W. Pracht, PhD University of Florida

DIGITAL E (www.wiley.com/go/volhandbook) Managing Voluntourism E.1 Muthusami Kumaran, PhD University of Florida Joanna Pappas Faith Ventures Investment Corporation
PART II  STRATEGIC DEPLOYMENT AND IMPLEMENTATION  203

ACCESSION

CHAPTER 8  The Latest Approach to Volunteer Recruitment: Competency-Competence Pathways and Volunteer Resource Management Systems  205
Stephen Hobbs, EdD
WELLth Learning Network

DIGITAL  F  (www.wiley.com/go/volhandbook)
Marketing Volunteerism for Specialized Cohorts  F.1
Lori Gotlieb
The Arthritis Society, Ontario Region

CHAPTER 9  Orientation: Welcoming New Volunteers into the Organization  227
Harriett C. Edwards, EdD
North Carolina State University

TRAINING

CHAPTER 10  Training Volunteers  237
Mary Kay Hood, MS
Hendricks Regional Health

COMMUNICATIONS

CHAPTER 11  Volunteer and Staff Relations  255
Nancy Macduff, MACE
Macduff/Bunt Associates

CHAPTER 12  Communicating with Volunteers and Staff  273
Denise Sevick Bortree, PhD
Penn State University

DIGITAL  G  (www.wiley.com/go/volhandbook)
Social Media and Volunteer Programs  G.1
Nancy Macduff, MACE
Macduff/Bunt Associates
PROGRAM MANAGEMENT

CHAPTER 13  Volunteer Performance Management: The Impact Wheel
Julie Anne Cross, PhD
Stratagem, Inc.
Stephen Hobbs, EdD
WELLth Learning Network

DIGITAL H  (www.wiley.com/go/volhandbook)
Effective Leadership and Decision-Making
Nicole LaMee Perez Steadman, PhD
University of Florida

CHAPTER 14  Risk Management in Volunteer Involvement
Linda L. Graff, BSW, MA
Linda Graff And Associates Inc.

DIGITAL I  (www.wiley.com/go/volhandbook)
Information System Tools for Volunteer Management
Debra C. Burrows, PhD
The Pennsylvania State University

DIGITAL J  (www.wiley.com/go/volhandbook)
Executive and Managerial Coaching in Nonprofits: Critical Leadership Development
Milena Meneghetti, MSc, CHRP, Registered Psychologist
Family Psychology Centre

PART III  RESULTS AND EVALUATION

CHAPTER 15  Evaluating the Volunteer Program: Contexts and Models
Jeffrey L. Brudney, PhD
Cleveland State University
Tamara G. Nezhina, PhD
DePaul University

CHAPTER 16  Evaluating Impact of Volunteer Programs
R. Dale Safrit, EdD
North Carolina State University
PART IV

(www.wiley.com/go/volhandbook) APPLIED MANAGEMENT PRACTICE

DIGITAL K

(www.wiley.com/go/volhandbook) Mission Fulfillment (Even During Challenging Times) K.1

Brian P. Higley, PhD
*The Building Blocks LLC and the University of North Florida*
Martin Heesacker, PhD
*University of Florida*
Brian J. Mistler, PhD
*Hobart and William Smith Colleges*
Justin Farinelli, BS
*Second Lieutenant U.S. Army*

DIGITAL L

(www.wiley.com/go/volhandbook) Ethics: Professional Ethics for Volunteers L.1

Joan E. Pynes, PhD
*University of South Florida*

DIGITAL M

(www.wiley.com/go/volhandbook) Professionalism and Credentialing in the Field of Volunteer Management M.1

Lawrence Ullian, EdD and CVA
*Muskie School of Public Service, University of Southern Maine*
Anne B. Schink, CVA
*Consultant in Volunteer Management*

DIGITAL N

(www.wiley.com/go/volhandbook) Advocacy in Volunteer Management N.1

Anne B. Schink, CVA
*Consultant in Volunteer Management*
Lawrence Ullian, EdD, CVA
*Muskie School of Public Service, University of Southern Maine*

DIGITAL O

(www.wiley.com/go/volhandbook) National, State, and Local Community Programs for Volunteer Resource Managers O.1

Kristin Callazzo Hodgson, CAE
*Clinical and Laboratory Standards Institute*

DIGITAL P

(www.wiley.com/go/volhandbook) Volunteer Management: Hospice Organizations P.1

Ginny Burns, CVA
*Big Bend Hospice*
Nonprofit organizations (NPOs) provide the majority of human services in the United States—collectively called “quality of life.” Better management and leadership within these organizations directly contribute to an improved quality of life for millions of Americans. This has been the overarching goal of the many books, articles, and training courses that have been developed in recent years focused on NPO and volunteer management (Connors, 2010a).

It has been slightly more than 30 years since the first Nonprofit Organization Handbook was published (Connors, 1980). The handbook’s organization, fulfilled by 28 contributors, established for the first time the fact that regardless of the specific public service provided, not-for-profit organizations shared seven areas of management—from fundraising to volunteer administration.

“Volunteers: An Indispensable Human Resource in a Democratic Society” was the title of the section in the NPO Handbook that covered all major areas of volunteer management and administration. All five of the chapters in that section were written by Dr. Eva Schindler-Rainman, a gifted visionary in several fields. A brief overview of her remarkably accurate predictions made in 1980 about the world of volunteer resource management provides a benchmark against which we can both measure progress and chart a course into the future:

- Volunteers will be in every sector of the community, Schinder-Rainman predicted, all over the country, and they will be affecting policy making, changes, and growth.
- New courses will be offered in community colleges and universities for administrators of volunteer programs as well as for volunteers themselves.
- Credit will be given for volunteer work. (Agencies will keep track of what volunteers do so that volunteers can include this experience in their resumes.)
- Research on values and the effect of volunteers on the delivery of human services will increase.
- New collaborative bodies will emerge to utilize better the human and material resources that are available.
- New, portable, interesting, participative training programs for paraprofessionals, professionals, and volunteers will be developed.
- New ways to recognize volunteers will be developed (Schindler-Rainman, 1980, pp. 3–7).

Portions of the introduction to the preface are based on a 2010 article by the author published in the International Journal of Volunteer Administration (Vol. 25, No. 1). Used with written permission of the editor of The International Journal of Volunteer Administration.
“This is probably the most exciting time in the history of the United States to be active in the volunteer world,” Dr. Schindler-Rainman concluded her prescient perspective. “These times offer a tremendous opportunity for volunteers to make important contributions to the quality of life and to human services in their communities. It is clear that the volunteer administrator is a key person in translating the motivation, interest, resources, and skills of volunteers into human services to the clients of our people-helping agencies and organizations.”

The Present of Volunteer Resource Management

A work such as this handbook is designed for both the present and the future. As an “answer book” for volunteer resource management, it attempts to provide useful perspective and guidance for current issues as well as to anticipate—and cover—where possible, those trends, issues, and developments that lie ahead for this important area of management.

Despite the challenges and pressures of America’s struggling economy, Americans are still volunteering in record numbers. Their generosity and willingness to serve their communities account for a significant proportion of the enormous variety of human services provided by the nation’s voluntary action sector. As our economy has slowed and charities have struggled to provide services based on budgets that were ever more constrained, volunteers have become even more vital to the health of our communities and their ability to sustain quality of life for their citizens. Most charities that use volunteers to provide all or a portion of their public services and mission fulfillment report they are increasing the number of volunteers they use. This further validates how important volunteers are to any nation depending on voluntary action organizations to provide an astonishing variety of services on which many aspects of national quality of life are based. In addition to the invaluable services delivery contributions volunteers provide, they are also much more likely than nonvolunteers to donate to a charitable cause.

Assessments and Projections

As we move into the second decade of the 21st century, any assessment and projection of volunteer resource management should begin with the professionals currently leading in this important field. Much of this overview is derived from a 2010–2011 “Future of Volunteer Resource Management Study” conducted by the author to provide new, more specific data from volunteer resource manager (VRM) professionals (Connors, 2010). The data were derived from a convenience sample but represented a wide range of VRM professionals across the country and from Canada, England and Australia. The generalized findings were used to support initiatives by the Council for Certification in Volunteer Administration, ARNOVA, and the Florida Association of Volunteer Managers.

A profile for a typical respondent to the survey would include these characteristics:

- Annual budget over $500,000.
- Volunteer program size range from 100 to more than 250 volunteers.
- Staff size range from 10 to more than 25.
The majority of respondents conducted program operations in metropolitan areas of 100,000 to more than 500,000 residents.

More than half of the respondents (52%) were currently serving in volunteer resource management positions, with strong representation from others serving as academic faculty (14%), executive directors (12%), or consultants (10%).

A significant majority (64%) reported more than 15 to 20 years’ experience in the field of volunteer resource management and in nonprofit management (56%).

Virtually all respondents reported professional affiliations at local, state, and national levels.

Professional responsibilities largely included volunteer resource management (85%), but many were also charged with responsibilities in such areas as resource development (63%), human resource management (41%), NPO management (44%), or as a member of the board of directors (29%).

Finally, a majority (53%) expressed a preference for the professional title of “manager/director of volunteer resources,” followed by “director of volunteer services” (20%).

Resources Needed by Volunteer Resource Managers

A convincing majority of the respondents requested additional resources in such areas as:

- Distance education courses in volunteer management (75%)
- Graduate courses in volunteer resource development/management (66%)
- Undergraduate courses in volunteer resource development/management (56%)
- Distance education courses in NPO/charitable organization management (54%)
- Graduate courses in NPO/charitable organization management (54%)

Career Progression

Volunteer resource management was seen very strongly (90%) as an important credential and career stepping-stone to senior management positions in the voluntary action organization. Barriers remain, however, for most VRMs in their efforts to have programs recognized for their true potential as a major contributor to the organization’s strategic objectives. For example, most managers (48%) have inadequate access to the organization’s chief executive and operating officers. Other managers need more training in such management areas as strategic planning and implementation (71%). Many volunteer resource programs remain underappreciated and underdeveloped regarding their strategic potential to the organization’s ability to fulfill its public service mission. Finally, the great majority of VRMs (84%) reported not being included in top-level planning by the senior management team. The latter can easily become the proverbial self-fulfilling prophecy and argument in circulo. “We don’t invite our volunteer coordinator to senior staff meetings because the volunteer program doesn’t generate any funds, and has little connection or relevance to our organization’s big picture operations.”

Most of us will clearly see the fallacy of such “reasoning.” Without having a better understanding of the organization’s big picture, the VRM will find it a challenge, to say
the least, to connect the dots between the volunteer program and other program activities and organizational goals and therefore to optimize the potential to contribute more fully to the organization’s mission fulfillment. In many NPOs, the personnel person at senior staff meetings is typically the human resources manager. There could be many reasons why this individual—responsible for paid staff—might not see his or her responsibility as that of an advocate for the volunteer resource program and its role in the organization’s operations. Until the volunteer resource management position is that of a department head, far too many nonprofits will fail to fully realize and develop the potential inherent in their corps of volunteers. There needs to be “a greater sense of volunteer resource management as a management-level responsibility within organizations—not simply tacked on to some other job description or relegated to non-decision-makers” (Connors, 2010b).

Senior Executive Track

Within the field of NPO management, there is growing recognition that successful managerial experience as a VRM should be more highly valued as a qualifier for senior executive positions. A related awareness is how important the volunteer resource program is to the organization’s ability to fulfill its mission, as evidenced by the increasing number of organizations that establish volunteer position descriptions that are highly correlated to their mission, purpose, and strategic plan.

Even as the number of business and public administration courses focusing on volunteer resource management is increasing, wasteful and shortsighted misconceptions at the organizational level can be found in too many nonprofits: for example, “We need a volunteer administrator to schedule volunteers for open shifts.” However, more organizations are recognizing volunteer resource management as a department head–level organizational function, alongside development, marketing, and operations. A broader awareness and understanding regarding the contributions of VRMs to organizational success recognizes the shortcomings of prior assumptions, such as “volunteer management is not as important as other departments because it doesn’t generate any money for the organization.” In fact, volunteer resources, when given the full assessment they deserve regarding their many contributions to overall organization mission fulfillment, are seen as vital components of services delivery, membership recruitment, donor base, and community image/support.

Volunteer resource management is not only seeing stronger trends of professionalism within the field but is increasingly recognized as a stepping-stone to more senior responsibilities within the organization. However, preparing current VRMs for future senior executive positions will require more diversification of their education and experience to include much of the same managerial knowledge base now available to and expected in more senior leaders of charitable organizations. It will also require moving from a predominant management perspective, to a leadership perspective regarding volunteer resources.

Meanwhile, career burnout and turnover issues are seen as major problems (87%), and their causes remain to be addressed, including: budget cutbacks (65%), inadequate salaries for VRMs (72%), burnout (72%), and lack of career progression identification (i.e., establish an identified career track for VRMs to senior nonprofit management positions) (75%). Other contributors to turnover (20%) include: lack of
respect “within the management structure”; “lack of value for what we do”; funding positions on “soft money,” thus adding doubt about future commitment and continuity; unrealistic expectations by chief executives and executive directors expressed by “the more, the better” mentality; and lack of positive feedback: “[I]f the person isn’t getting positive feedback from the organization, there is no payback—people move on!” (Connors, 2010b).

Expanding Options and Opportunities

Opportunities for volunteer engagement and participation are growing in number and in scope. In addition to traditional volunteer opportunities, most organizations have seen the inherent value in expanding their opportunities for episodic volunteering, virtual volunteering, and corporate volunteering. These new opportunities have required additional management responsibilities for professional VRMs and more focus on internal coordination to ensure effectiveness.

The population and cohort bases from which potential volunteers are drawn are expected to steadily expand. The number of active volunteers is projected to increase more rapidly among such groups as “boomers” and minority populations, many of whom have not traditionally been greatly involved in volunteerism. More seniors and early retirees are expected to participate in the volunteer service experience. Increases are also projected in episodic and group volunteering, coupled with significant increases in the use of social media to communicate with volunteers and to build organizational relationships. Also, unemployed individuals may represent significant potential volunteer resources as they maintain professional skills, add additional resume competencies, and remain meaningfully engaged in worthy activities supporting their community.

International Volunteering Trends

As the capacities of the social media grow to include ever-improving capabilities to coordinate basically spontaneous responses, a new type of international volunteer is appearing. Some have referred to them as “spontaneours”—unaffiliated or entrepreneurial volunteers—particularly for involvement in disaster relief. How will volunteer resource management deal with this type of volunteer and opportunity—how do we attract and engage these independent, individualistic, creative individuals, and to what extent should we involve them in our organization and the structure or adapt our programs to fit their emerging needs? As these spontaneours and other volunteers with a global focus continue to serve in expanding international roles—some having global reach and impact—what changes, if any, do we see ahead in such areas as management practices, training, education, and program planning?

For those countries lacking terms or concepts for volunteerism, should we not develop definitions, roles, and complementary core values that promote more effective transference of volunteerism across cultural lines to fulfill its international potential? We must also be alert to the concerns expressed by some who are dubious of international roles for volunteers and their impact on more locally focused nonprofits. Whether considered at the community-based or international levels, volunteers are partners, collaborators, hands-on providers of human services working in a local
context. To some, the global reach and impact of volunteerism appears to be and “feels like” activism. Volunteers for these international causes or organizations are seen to be energized by a much broader and more complex set of motivators than are local volunteers.

**Professional Development Evolution**

Nonprofits with highly successful volunteer resource management programs report strong correlations between the results achieved by those programs and the professional training and experience of their VRMs. In short, successful volunteer management programs—those that contribute significantly to the organization’s success in fulfilling its mission—are strongly correlated to the education, training, and experience of their professional VRMs. Can that really be surprising?

Overall, professional development opportunities for VRMs are expanding and improving, with colleges and universities adding a growing number of training and education opportunities. However, their quality, comprehensiveness, and consistency need continuing focus by national organizations.

As the field of volunteer resource management continues to evolve and mature, we should align our efforts to bring more consistency across the discipline, particularly in training and education. The continuing national dialogue regarding the importance and future of volunteer resource management should bring about more general agreement regarding the role and relationship of volunteers throughout the organization, more agreement on the overall business model for the field, and more agreement regarding the overall body of effective management principles and practices.

Professional development evolution career ladders for VRMs should be identified, defined, and supported by higher education and credentialing to provide not only fundamental skills but meaningful professional development.

Fortunately, volunteer resource management is now far more frequently recognized as a professional specialty, and the tools and opportunities for acquiring professional credentials, education, and status are increasingly available. Currently, and we hope temporarily, in many areas, the need for volunteer managers has outpaced the ability of the professional VRM pipeline to provide enough qualified professionals. Many organizations have resorted to filling what should be a post for a VRM with a far less experienced and qualified staff member to serve as a volunteer coordinator or volunteer administrator. Providing adequate professional development education and training in this field will remain a challenge for the foreseeable future.

Additional research is needed to demonstrate the value added and the significant impact of effective strategic volunteer engagement. Concurrent research is needed to identify and quantify the additional value added provided by professional VRMs versus those lacking that education, training, or experience.

The training, education, management, and more effective leadership of volunteers should be better understood and recognized as vital contributors to the organizational effectiveness of charities whose human services help our societies achieve and sustain meaningful quality of life. This point also argues strongly in favor of a higher priority for professional development of the VRM.
Adaptive Management Practices

Successful VRMs are learning to be more effective while managing and leading within dynamic, fluid program environments that often require direct and immediate responses to constantly changing local needs or organizational priorities affected by an evolving, and sometimes threatening, operating environment. For example, VRMs will need to hone program management skills that will enable them to recruit and manage volunteers remotely through such media as social networking. Further, many VRMs are managing programs that rely more heavily on short-term volunteers, since fewer volunteers are able—or willing—to commit to long-term volunteer engagement. VRMs must be prepared to deal with larger numbers of volunteers on a short-term basis. This reality also requires additional attention to such factors as risk management (increasing scrutiny of program activities for potential liability), appropriate training, and scheduling—more volunteers cannot commit to a fixed schedule. Finally, many volunteers see themselves more as partners than as resources to be managed.

The ongoing national focus on improved efficiency, effectiveness, transparency, and accountability by all nonprofits—with particular emphasis on those organizations that accept public funding—will also affect volunteer resource programs. This national focus will be reflected within volunteer resource management by sharpened interest in our ability to measure program outcomes, and to demonstrate the overall value of volunteer participation. A potential danger here rests in the use of models and program measures derived from the for-profit sector that may not represent an appropriate fit when applied to human services delivery by public charities.

Program Planning Trends

Volunteer position descriptions will need to be carefully considered not only for their relevance and correlation to organizational mission fulfillment and strategic planning but also in their ability to interest and attract volunteers who will not be satisfied with envelope-stuffing responsibilities. Today’s volunteers increasingly seek service opportunities offering some growth or learning potential or that might offer some potential for a paid position. Not surprisingly, volunteers want to know what they accomplish for the organization or its clients (i.e., what difference they made as a result of their service). Further, many volunteers see themselves as not simply drudges but as leaders and decision makers who feel strong connections to the organization, its mission, and its overall contribution to the community’s quality of life.

Technology Vistas

Technology will continue to offer more efficient and effective options within volunteer resource management for those professionals willing to stay abreast of evolving applications and to consider innovative approaches to its programmatic use. For example, it is clear that the ability of advancing technology and networking capabilities to provide instant access to information and coordination through communication is vital to both volunteers and VRMs. We can expect to see more results and
program success attributed to a creative focus on effective use of information management and communication technology throughout the volunteer resource management process—from recruiting and accession, and options and scheduling, to recognition and program evaluation.

Advances in communications and information management technologies have made it possible for many organizations to move to less in-person training by the volunteer manager to more training on the job and/or online, much of it coordinated by volunteers supervised by the professional manager.

**Synergy of Personal Contact**

While there is no denying the power of the growing number of social networking media available for use in a volunteer resource management program, many practitioners remain convinced that people miss the powerful synergy of personal contact—a phone call, a knock at the door, reaching out. Why else, they ask, do so many volunteer organizations and centers have such great success with a weekly or monthly coffee club as recruiting and orientation opportunities for programs and projects? How can such retro ideas such as neighborhood groups and block parties be successfully integrated with the resources inherent in social networking?

**Volunteer Management Handbook**

**Growth of Volunteer Resource Programs**

The great majority of the nation’s NPOs (those with incomes above $25,000 annually in gross receipts) depend on volunteers to provide an enormous range of services that are essential to the organizations in fulfilling their public service missions. In addition, volunteers brought significant benefits to 90% of these major nonprofits, with two-thirds reporting substantial cost savings and increased quality of services and programs (AFP eWire, 2004).

Clearly, every day across the United States, countless numbers of NPOs are either considering starting a volunteer resource management program for their organization or assessing their current program to ensure that every possible contribution it might make to the organization’s mission fulfillment is optimized. As Pynes (2009) explains:

> "Volunteers are an attractive resource for agencies because they cost little, can give detailed attention to people for whom paid employees do not always have the time, often provide specialized skills, provide an expansion of staff in emergencies and peak load periods, enable agencies to expand levels of service despite budgetary limitations, and are good for public relations." (p. 117)

**Walls to Bridges**

Information technology (IT) continues to change and expand the ways in which the world communicates, leads and manages, and interacts. Today we consider a wide variety of social media as business as usual and expect to be able to access virtually
every product, and most information, online and retrievable at a moment’s notice. Yet a few moments’ reflection will bring to mind the fact that not long ago, these expectations were barely conceived, much less considered commonplace.

Not long ago, a book or publication was considered through a long lens that stretched back to Gutenberg and the days of hand-carved wooden type. In a relatively short period of time, as a direct result of advancing information technology that has brought us instant online access and retrieveability, our concept of a publication has expanded far beyond that of printed pages contained within a front and back cover.

Traditional publishing requires creation of a printed-on-paper, bound-with-plasticized-covers, “linear” product that must be boxed, stored, shipped/handled, and “consumed” cover to cover. These ever more costly attributes increasingly represent walls for reader/users, subject matter experts wishing to share their expertise, and publishers trying to meet the needs of their customers for answers and information. Digital publishing offers significant advantages through its economical use of resources, availability, and online access for users to up-to-date information and the ability to include the perspectives and viewpoints of more subject matter experts in a single “publication.” In fact, the advantages of digital publishing are changing the former walls of traditional publishing into bridges to the future.

Modeling the Future of Volunteer Resource Management

The second edition of the Volunteer Management Handbook takes full advantage of the expanding capabilities offered by IT and digital publishing. A work such as the handbook is designed for both the present and the future. As an “answer book” for volunteer resource management, it attempts to provide useful perspective and guidance for current issues as well as to anticipate—and cover—where possible, those trends, issues, and developments that lie ahead for this important area of management.

The volunteer resource management cycle is a process that begins with organizational assessment and planning and concludes with volunteer program assessments to evaluate its effectiveness and to incorporate those findings into program improvements. Exhibit I.1 illustrates the fundamentals of volunteer resource management (despite the limitations of a linear diagram). The illustration suggests the general phases and sequence of the typical, cyclical process. Volunteer resource management should not be considered a one-time process or exercise. Instead, volunteer resource management planning in various forms and degrees should reflect an ongoing, dynamic, iterative process that would be more accurately represented by a diagram such as that first proposed by Walter Edward Shewart in 1939.

Sometimes called the Shewhart cycle or the (W. Edwards) Deming wheel, after the acknowledged founder of quality management, it is most often referred to as the PDCA cycle, or Plan-Do-Check-Act (Scherkenbach, 1990). In this case, a PDCA approach to volunteer resource management planning moves cyclically through four stages: assessment/analysis; planning; strategic deployment and implementation; and results and evaluation. The assessment-planning-implementation-evaluation process for volunteer resource management begins with organizational assessment and planning and concludes with volunteer program assessments to evaluate its
effectiveness—measurement and analysis to determine the extent to which the plan was achieving the results intended. Fact-based decisions can then be used to adjust or revise the plan as needed to ensure continued movement in the direction of mission fulfillment. Finally, these data become decisions that are applied as program improvements—that are then plugged into another cycle of assessment and analysis (i.e., continuous process improvement).

As the Ishikawa ("fishbone") diagram in Exhibit I.1 illustrates, the fundamental management model for NPOs can be seen as including four stages: assessment/analysis, planning, strategic deployment/implementation, and results/evaluation. Safrit and Schmiesing provide additional detail and perspective regarding volunteer resource management business process models in Chapter 1, “Volunteer Models and Management.”

The basic stages and typical sequence of volunteer resource management activity include:

- Volunteer policy making
- Planning and staff analysis
- Options for volunteer service (including episodic, online/virtual, and traditional modes)
- Recruitment, screening, orientation, and training
- Supervision
- Legal and risk management
- Communications
- Volunteer and staff relations
- Program evaluation
- Rewards and recognition (Connors, 2009).

Chapter topics and contributors were sought for each major business area. Further, chapters were organized, in general and where possible, to follow the flow or sequence of the model, thus suggesting a general management (and instructional) sequence. Contributors were urged to keep praxis as a major objective—the translation and application of theory to practice in NPO management. For those of us who are faced daily with real-world issues and services delivery requirements, this practical knowledge grounded in theory will be highly useful.

Annotated Volunteer Resource Management Model

The handbook, its chapters, and their authors are summarized next in the context of the volunteer resource management model around which the book is organized. As both a print and digital publication, the Volunteer Management Handbook is able to offer the strongest value for its readers and users by taking the fullest advantage of online access provided by ever-expanding IT capabilities and digital publishing. Digital chapters can be accessed from the Web site (www.wiley.com/go/volhandbook). (See “About the Web Site” at the back of this book.)

Part I: Volunteer Resource Program Assessment, Analysis, and Planning

Organizational Assessment/Planning

Chapter 1: Volunteer Models and Management
R. Dale Safrit, EdD, and Ryan Schmiesing, PhD

Chapter 1 introduces and defines the concept of volunteer management to establish a foundation of relevant management definitions, business model comparisons, and how they interrelate with the concepts of volunteer and volunteerism. The authors provide an important and fundamental definition of volunteer management as “the systematic and logical process of working with and through volunteers to achieve the organization’s objectives in an ever-changing environment.” Historical models of volunteer management are explained, with attention paid to their major contributions to theory and practice, culminating in an in-depth description of the PEP model of volunteer administration: (personal) preparation, (volunteer) engagement, and (program) perpetuation. The authors conclude the discussion of volunteer resource management models by identifying and sequencing competencies and management activities, urging that as practices change—as they inevitably will to reflect changes in the operating environment for NPOs—degree and certification programs should incorporate these changes into their curricula to ensure relevancy and high levels of individual preparation for the workforce.

Chapter 2: Volunteer Demographics
Harriett C. Edwards, EdD, R. Dale Safrit, EdD, and Kimberly Allen, PhD

Chapter 2 explores the concept of volunteer demographics from three perspectives: Volunteer demographics in the United States are described for 2010 (as well as selected demographic trends since 1974); volunteer
demographics are approached from the perspective of human development across the life span, with accompanying critical implications for volunteerism and volunteer management based on specific periods of human development; and volunteer demographics are discussed based on the contemporary theory of generational cohorts, again with accompanying critical implications for volunteerism and volunteer management based on specific generational cohorts.

The authors provide a framework combining both theory and practice that underscores the importance of understanding and considering demographics as the matrix within which “the larger stage on which the theater of volunteerism is enacted.” Further, the authors correlate important demographic considerations with proven management practices to, using their own analogy, establish a beautiful quilt that creates synergy through combining individual blocks.

Chapter 3: Preparing the Organization for Volunteers
Jeffery L. Brudney, PhD

“In their eagerness to reap the benefits of volunteer participation, organizational leadership may overlook the groundwork necessary to create and sustain a viable volunteer program,” Brudney points out in Chapter 3. “Although understandable, this tendency can jeopardize the potential advantages … increase problem areas.”

Brudney explains why governance leaders are well advised to weigh the costs and benefits of volunteer participation in ways that support the organization’s ability to fulfill its mission and to establish reasonable expectations for these programs. For example, the rationale and goals for the volunteer program should establish the basis for why volunteer involvement matters to the organization—is the fundamental question “Why are we doing this?” Paid staff should be meaningfully involved in helping to design the volunteer resource program, thus ensuring smoother program implementation and more effective operation. Thought should be given to how the volunteer resource program and its participants will be incorporated into the organization structure—for example, housing and management. Leadership positions should be developed that outline responsibilities and provide directions for the new volunteer program. “To the degree that leadership undertakes these activities, the organization should avoid the potential pitfalls and generate the considerable benefits of volunteer involvement,” Brudney concludes.

Digital A: Volunteer Management of Governance Volunteers
Keith Seel, PhD, CVA

The term “governance volunteers” typically refers to members of the NPO’s board of directors. There are an estimated 5 to 7 million governance volunteers serving on boards of directors in North America. These volunteers serve their organizations and their communities based on the requirements of their states or provinces relating to incorporation. Seel explains and outlines the general frameworks that defined the roles and responsibilities of governance volunteers. He also correlates the core competencies of
volunteer resource management with governance domains to identify connections and linkages between the two areas of responsibility. Significantly, he explains how knowledgeable VRMs can use their experience to improve the overall functioning of boards of directors.

Seel makes the case for more effective bridging between the worlds of governance and volunteer resource management in ways that help bring about more positive outcomes for the NPO. Governance volunteers will benefit from the knowledge and skills of a professional VRM, he emphasizes. On matters of policy or risk management, he stresses the importance of consistency and integration across all levels of volunteer engagement. Finally, he emphasizes and explains the reasons behind why human resource assets of the organization—both volunteers and staff—can and should be deployed more effectively to accomplish the organization’s mission.

Chapter 4: Shaping an Organizational Culture of Employee and Volunteer Commitment
Judith A. M. Smith, DM

NPOs successfully recruit volunteers based on such factors as their compelling missions, a charismatic leader, or whether the particular volunteer position represents an ideal match of the skills and services they have to offer. Very soon after new volunteers join the organization, they begin to experience the organization’s culture. The invisible hand of organizational culture, as Smith explains, will determine whether new volunteers will internalize the organization’s goals and values, whether they will exert their best efforts on behalf of the organization, and whether they will develop a commitment to the organization, its programs, and its mission.

Conversely, the organization’s culture can have a negative influence on volunteers and turn them away from the organization and in the direction of other options—ranging from volunteering within the different organization to using their discretionary time in a different way. In short, organizational culture matters a great deal, and its dynamics need to be understood by all of the organization’s leaders, perhaps in particular by the VRM. Smith outlines the dynamics and concepts of organizational culture and explains why it is a major challenge to make genuine cultural changes within any organization.

Smith offers a four-dimensional cultural assessment model and analytical tool that incorporates physical, intellectual, emotional, and spiritual components and suggests why these dimensions are useful to better understand an organizational culture.

Digital B: Understanding the Changing Organization as a Primary Context for Volunteering
Judith A. M. Smith, DM

NPOs, certainly including the volunteer resource programs used in most to provide a substantial part of their human services delivery, are operating in a chaotic world, where rapid change verging on chaos has become the new status quo. As Smith correctly points out, the roles of the individual volunteer and of the VRM are undergoing fundamental change as a reflection of the changes the organization itself must make in order to survive and to fulfill its mission.
Smith summarizes the evolution of organizational structure from the dawn of the industrial age through contemporary times. Having established a basis for comparison, she offers us a glimpse of tomorrow’s organizations. She concludes by explaining the perspective to be gained from each of the industrial era theories, including the evolution of bureaucracy “as the crowning achievement of the industrial era.” This generation is privileged, she explains, to be offered the challenges inherent in dealing successfully with the reality of a new world of management, one evolving during our lifetime, and reshaping our organizational operations and structure with new ways of obtaining and using information, IT, and information networks. The world is changing, the organizational work is changing, the role of the worker is changing, and the volunteer workforce is changing as a reflection of the milieu from which they come forward to serve their communities. Smith explains this historical and organizational context in ways that help our VRMs better optimize the value that volunteers can add to our organizations and their contributions to quality of life.

**Digital C: Organizational and Programmatic Benefits from Adversity: Comprehending the Centrality of the Role of Adverse Experiences in and on the NPO and Its Programs**

Elizabeth Power, MEd

Adversity, and how we learn from it and respond to it, is the focus of this thought-provoking and insightful chapter. Power addresses the backdrop of adverse experiences and how they influence individuals, organizations, and programs; how they can manifest themselves in the organizational environment; and how organizations can establish a culture conscious of the span of experience that includes adversity as a factor in its dynamics.

Many NPOs, or programs within them, were launched to turn adverse experiences into positive action. Adversity, as Power points out, has many faces and has the ability, regardless of how resilient an individual, an organization, or community might be, to affect all areas of life. Her discussion of organizational culture change focuses on assessing the culture to determine its current state, defining the desired future state, then identifying and implementing the actions needed to achieve and sustain the envisioned culture. The experience-informed organization is aware and mindful of the presence, power, and impact of favorable as well as adverse experiences on the people with whom it is involved.

Adversity can, and often does, affect volunteer program cycles. The astute VRM understands that volunteer programs should incorporate the reality “that people do the work they do for reasons often related to the cause,” and that often includes adverse experiences. Power suggests the importance of incorporating known best practices from other fields—such as that of trauma-informed care—into volunteer programs where appropriate.

Awareness of the role of adversity in affecting the behavior of individuals and organizational culture can and should lead to program strategies and tactics that reduce the stress of working with impacted persons, increase the quality of interactions at all levels, and contribute to overall stakeholder
wellness. Models from the trauma-informed care foster responses based on collaboration, organizational and individual self-care, and practical parallels between the elements common to those models and an organization’s stated and operative processes.

**Operational Assessment and Planning**

**Chapter 5: Maximizing Volunteer Engagement**
Sarah Jane Rehnborg, PhD, and Meg Moore, MBA

Leaders of organizations engaging volunteers to help deliver human services and thus support the organization’s mission should have an expansive conceptualization of volunteering. They need to understand the complex interactions between the needs and goals of the organization (or the cause it serves) and the expectations and concerns of those delivering services “of their own free will”—volunteers.

Rehnborg and Moore offer the Volunteer Involvement Framework (weighing opportunities, challenges, and risks) as a means to better understand contemporary themes in volunteer engagement and to organize the information to assist in job design, recruitment, and decision making. This framework helps guide volunteer managers, executive directors, and board leaders in establishing their volunteer engagement practices, identifying service opportunities, and dealing with staffing and management issues. With the proper information, the framework can serve as a basis to conceptualize a comprehensive, diverse, sustainable, volunteer engagement initiative.

The process of recruiting volunteers begins with the organization’s assessment and analysis of the current or projected volunteer program. The analysis must give adequate consideration and forethought to how volunteers fit within and contribute to the organization’s larger mission and, further, how the envisioned future state of volunteer engagement aligns with other organizational strategic goals, thus creating a sustainable foundation for ultimate success. The authors outline a highly useful and original template for planning or reassessing your organization’s volunteer-engagement strategy.

**Chapter 6: Assessment, Planning, and Staffing Analysis**
Cheryle N. Yallen, MS, and Barbara K. Wentworth, MS

Assessment, planning, and staffing analysis represent three vital areas within volunteer program management and leadership. Authors Cheryle Yallen and Barbara Wentworth review the many benefits and contributions that an effective volunteer resource management program can make to the organization’s mission fulfillment. Developing and sustaining a successful volunteer resources program also presents challenges, ranging from adequate financial resources and building support from the board and staff, to investing insightful planning in the program’s definition and deployment. After reviewing major demographic sources of volunteers and typical opportunities for volunteer service, the authors stress the importance of preprogram assessment, alignment with the organization’s mission and vision, and consideration of those benefits and challenges inherent in a volunteer program (e.g., required resources).
A strategic job analysis includes the process of identifying the specific tasks to be performed, including the knowledge, skills, abilities, and other (KSAO) characteristics that are required to perform the newly defined position successfully. KSAOs should be prepared and in place for all current and projected volunteer positions and should be highly aligned and correlated with the organization's strategic plan, goals, and objectives.

The authors outline the process of competency modeling that identifies the specific competencies that characterize high-performance and success in any given job. These, too, should be aligned with the organization's strategic objectives. A volunteer position analysis includes competency modeling, position descriptions, and position specifications to ensure its effectiveness and alignment with the organization's strategic objectives. The authors include a strategic position analysis/competency template to assist readers in preparing job descriptions (basically summarizing the analysis) that help ensure greater success in recruiting the most qualified individuals for positions that will clearly advance the organization's mission efforts.

**Chapter 7: Policy Development for Volunteer Involvement**

Linda L. Graff, BSW, MA

Policies are developed to guide decisions and actions, articulate guiding principles, and identify expectations. Policies define limits and outline responsibilities within an organization, and can be prepared at almost any level and for almost any structural or operational area. Author Linda Graff discusses policies and procedures in the context of volunteer program management as they apply to all voluntary action organizations and all volunteer roles.

Far too many nonprofits operate with few, if any, volunteer resource management policies in place. This is a risky practice at best if we agree that policies are “critical to effective volunteer involvement, quality programming, excellence in service provision, increased productivity, and greater volunteer satisfaction.” These are all positive outcomes of good policy development.

If sustained superior organizational performance is insufficient to motivate policy development, potential risk and legal consequences inherent to inadequate policy should compel immediate and sustained attention to this highly important element of volunteer program infrastructure. Further, national trends will surely continue, if not accelerate, in the direction of increased accountability and transparency by voluntary organizations. These trends, combined with ever-higher standards of due diligence, demand greater attention by nonprofits to policies and procedures that guide the effective, efficient, and accountable management of all their programs, including volunteer resource management.

The author defines policies and why they are needed and offers a useful explanation of the policy development process, with particular attention on how to write policies for volunteer programs. Several sections offer concrete strategies to ensure good policies are also understood and followed, and the author concludes with helpful observations on successful introduction of well-written policy. Throughout, the practicality of this chapter is enhanced with the inclusion of dozens of sample policies that illuminate both the art
and the science of effective policy writing. Clearly, policies and procedures are crucial risk management tools, but they also enhance the effectiveness of volunteer involvement and the management of volunteer programs by communicating values and beliefs, articulating rules, identifying standards and expectations, and establishing boundaries, all of which support the work of individual volunteers while enhancing productivity, safety, and volunteer satisfaction.

**Digital D: Options for Volunteer Involvement**
Bryan D. Terry, PhD, Amy M. Harder, PhD, and Dale W. Pracht, PhD

The authors focus on the options for volunteer involvement by reviewing the factors that influence involvement. They begin by examining volunteer behavior in a way similar to how a market system relates to consumer behavior (including a review of the volunteer life cycle), then follow with a perspective on volunteerism created by reviewing the social, economic, and cultural trends that drive the voluntary sector. Important insights are offered into the social, economic, and cultural trends and advancements in technology that impact the options for volunteer involvement—types of volunteer involvement have changed over time—and can now be characterized by what they do, how they serve, who is volunteering, and physical location. The chapter concludes by suggesting that social, economic, and cultural change and technological advancement are factors that successful nonprofits should consider in deciding to expand and enrich their volunteer management programs—primarily by engaging a professional VRM or providing additional professional development opportunities for an existing position incumbent.

**Digital E: Managing Voluntourism**
Muthusami Kumaran, PhD, and Joanna Pappas

Voluntourism combines leisure travel with various types and durations of voluntary activities by the traveler at the destination site. In various forms, what is now known as voluntourism has been practiced for many years; however, the option of voluntary service has gained in popularity following its promotion by host organizations and others (e.g., the tourism industry).

The authors review important aspects of voluntourism to provide both perspective and actionable information on this fast-growing form of volunteering and its use by VRMs. Following a review of its history and trends, the motivations of voluntourists are explored, as well as the roles and responsibility of voluntourism operators and host organizations. Including voluntourism in a volunteer resource program also requires specific attention to such areas as recruitment, orientation, and training of the voluntourists.

Voluntourism programs offer a number of advantages, but prudent VRMs also understand and deal with potential issues, such as:

- Inadequate planning resulting in dissatisfaction
- Overly optimistic expectations in conflict with realities that can result in a sense of failure
- Inadequate on-site coordination resulting in project failure
- Inadequate living arrangements
Challenging safety or health conditions
Inadequate links with the destination community, resulting in negativity toward all involved

Voluntourism is a growing segment of the broader area of international voluntarism, and can be an effective program through which nonprofits deliver services in developing countries. Consideration by VRMs of both benefits and issues will help ensure that voluntourism continues to emerge and expand as an alternative domain where voluntarism and tourism can work together to achieve shared objectives.

Part II: Strategic Deployment and Implementation

Accession

Chapter 8: The Latest Approach to Volunteer Recruitment: Competency-Competence Pathways and Volunteer Resource Management Systems
Stephen Hobbs, EdD

“Volunteers are the lifeblood of a volunteer-based organization. While the organization mission, vision, and values are the backbone, the staff, the skeletal system, the clients, the organs of the body, and the community, the skin, it is the lifeblood-sharing efforts of the volunteers that keep the body nourished and vibrant,” Hobbs emphasizes.

“Recruiting or deciding on competent volunteers has become a science and an art. It is a science when the logical progression of steps and associated checks and balances are used to decide and confirm if the potential and competent volunteer is to move forward. Equally important are the creative, subjective insights VRMs use to guide their final decisions about confirming and forwarding competent volunteers into the organization.”

Following the requisite assessment, program planning, and creation of position profiles aligned with the organization’s mission and purpose, recruitment is the next stage in the typical volunteer accession process: the addition of qualified volunteers to various programs. Recruiting these qualified volunteers will significantly influence the organization’s operational productivity and therefore its efforts to fulfill its mission. Therefore, the tools and techniques used in managing the recruitment of competent volunteers are significant, the authors point out. These tools and techniques have advanced with the growing availability and stability of the Internet.

Hobbs explores and links the wise use of a software or Internet-enabled volunteer resources management system with competence validation. This complementarity offers VRMs a practical way to select, interview, and assign competent volunteers to move forward into the organization. Additional topics covered include the challenges facing volunteer recruitment and the implications for using a volunteer competency management system.

Digital F: Marketing Volunteerism for Specialized Cohorts
Lori Gotlieb

“Volunteers want choice, control, good customer service, supervision, clear job descriptions, recognition, training, and perks,” Gotlieb points out.
“They want to feel that they are appreciated.” Further, volunteers want more control over the positions of responsibility they fulfill for the organization and, where possible, to blend their volunteer commitment with their professional and personal life. A significant role for the VRM is to help ensure that both the organization and the volunteer have a successful experience. Previous chapters covered various aspects of the assessment process; Gotlieb focuses on more specialized volunteer service opportunities, including employee volunteerism, baby boomers, and students, emphasizing successful marketing concepts and practices in those areas.

A primary responsibility of VRMs is to ensure that both the organization and the volunteer have a successful experience. After reviewing what practitioners need to consider as they prepare themselves and their organization for a specialized volunteer program, the author discusses specific and proven management practices for designing and marketing volunteer opportunities to corporations, boomers, and students.

Marketing volunteerism is a “creative process, and there is no one specific answer.” Each organization has its own unique challenges and opportunities, and the prudent VRM recognizes those as opportunities to be “innovative, creative, and unique.”

Chapter 9: Orientation: Welcoming New Volunteers into the Organization
Harriett C. Edwards, EdD

Welcoming new volunteers into your organization is a critical first step to better ensure a successful experience for both the individual and your organization—and to fully realize the many benefits, over and beyond actual service, that dedicated volunteers bring with their affiliation. As Edwards points out, “By recruiting volunteers in a systematic way, the organization—and the volunteers—benefit from the establishment of a foundational relationship that supports both their motivation for involvement and the organization’s mission.” The author explains how orientation differs from training and provides actionable insights into the critical components of the orientation process and how to develop successful delivery strategies.

VRMs who establish a systematically planned orientation program will find that it includes components that provide new volunteers with knowledge about the organization and its mission, that ensure they feel more comfortable and confident in their ability to accomplish the work they are undertaking, and that help them better understand how what they do for the organization contributes to its overall goals, objectives, and mission fulfillment. The process should also provide an opportunity to build enthusiasm for their responsibilities and help them agree that they have made the right decision to volunteer with your organization. Finally, orientation helps avoid potential future issues by helping the new volunteers—and staff—understand the appropriate rules, policies, available resources, and organizational core values and culture.

Training

Chapter 10: Training Volunteers
Mary Kay Hood, MS

Training provides the skills and methods needed by the volunteer to be successful in a specific position, task, opportunity, or area of
responsibility. As the author correctly emphasizes, training is essential for a learning organization—one that seeks sustained superior performance—and focuses on improving quality, building competitive advantage, and energizing its workforce to effectively manage change and to achieve excellence. A discussion of learning styles prepares the reader for a follow-on review of generational issues that influence the design and implementation of the volunteer training program.

The author provides useful training fundamentals, followed by guidance on how to create a successful learning environment within the training program design.

An important core value for any voluntary action organization is that of continuous process improvement (CPI)—using analyzed experience and results to identify and incorporate improvements to the program as a part of a cyclical process of betterment. The author stresses the importance of meaningful evaluation and coaching as major contributors to improving your volunteer training program. The chapter concludes with a discussion of the importance—and techniques—of applied leadership within the training program and the importance of the VRM to lead by example.

Training should be considered an investment by, rather than as more typically the case, an expense to, the organization. The long-term payoff and payback provided by adequately trained volunteers includes not only better service delivery but a number of other benefits ranging from becoming recruiters themselves, improved risk management, and volunteers becoming significant sources of charitable contributions for the organization, to broadened community support.

Communications

Chapter 11: Volunteer and Staff Relations
Nancy Macduff, MACE

For some nonprofits, the relationship between volunteers and staff, the author points out, can be summed up as the organization’s “dirty little secret.” The relationship between volunteers and staff is both critical and complex, and it represents a critical determinant of volunteer engagement, the overall success of the organization’s volunteer program, and, ultimately, of the organization’s ability to fulfill its mission successfully. The overall relationship between staff and volunteers will significantly affect virtually all operational and programmatic areas within the organization. It is no secret that when people can work together as teams throughout the organization, more efficient and more effective services can be delivered to members, clients, or patrons. Teamwork, harmony, esprit de corps, and camaraderie do not just happen, however. Within the volunteer resource program, they are the products of thoughtful attention to both sides of the volunteer-staff equation, typically as a result of effective leadership on the part of the VRM.

The author cites data illustrating the positive correlation between organizations reporting strongly positive volunteer-staff relations and those having
a designated manager of volunteers using effective volunteer management processes. The characteristics of the effective volunteer-staff team are outlined, followed by a discussion of a variety of useful volunteer-staff teams.

Recognizing the symptoms of dysfunctional volunteer-staff relationships can be important to the very survival of the organization. The author explains and outlines these symptoms, and concludes with a useful volunteer-staff climate audit.

Finally, the author suggests a sequential process to build a successful volunteer-staff team, one that works together to achieve the mission of the organization. She concludes with tips based on successful management practice that enhance volunteer-staff relations.

A volunteer-staff team pulling together can provide the collective energy and direction to propel the organizational vehicle toward its goal of mission accomplishment—or it can pull the vehicle to pieces.

Chapter 12: Communicating with Volunteers and Staff
Denise Sevick Bortree, PhD

One of the most important contributors to the relationship that is formed between NPOs and their volunteers is communication. “Research suggests that volunteers who feel more informed about the organization are more satisfied with their relationship with it. Organizations cannot underestimate the importance of keeping an open line of communication with their volunteers and staff.” This chapter covers the important processes of communication, the way that communication strengthens the relationship between a nonprofit and its volunteers and staff, and new trends and channels being used in the field.

The author explores the process for sustained communication campaigns for volunteer and staff audiences and suggests that research, strategy, and planning are key elements of a successful campaign. In addition, the chapter introduces a number of approaches and tactics that could be used to reach these audiences.

“Communication can be a powerful tool for management of volunteers and staff,” Bortree emphasizes. “When communication is frequent, clear, meaningful, and transparent, it can be an important ingredient in a positive relationship between volunteers, staff, and management. Informing, persuading, and motivating volunteers and staff toward organizational goals can be challenging; however, change is more easily achieved when an organization maintains a positive relationship with these audiences through effective communication.”

Digital G: Social Media and Volunteer Programs
Nancy Macduff, MACE

Social media—few of us leave home without it. At home, virtually all of our computers are either actively on a social media page, or we have it minimized at the foot of our screen so that we can check it periodically. Not surprisingly, social media have rapidly appeared as essential communications tools within and for volunteer resource management programs. Understanding the realities of how quickly communications media evolve in and
of existence, the author reviews the concepts and capabilities inherent in the new media. Her focus is on their longevity as management and leadership tools, not on the likelihood of survival by any particular social medium (e.g., Twitter or Facebook).

After reviewing the various types of social media, the author outlines the frequency of their use within the NPO and cites data that provide a fact-based perspective on how these media are impacting nonprofit operations and programming. While some VRMs might be tempted to move immediately in the direction of creating a social medium Web site for their volunteer program, its ultimate success is far more likely if they follow the author's process of analysis, planning, and implementation. She concludes the chapter with a comparison of volunteer management functions, program activities by area, and ideas on how social media can be applied to each area.

In order to be used effectively within any program, social media applications—particularly volunteer resource programs—must relate to both the objectives of the program and their contribution to the organization’s ability to fulfill its mission. In terms of the volunteer management program, social media should be used in ways that make program administration both more efficient and effective, enhance the program’s objectives, and save time and money for the organization and the program manager.

Social media are not the only answer to all our problems. Improperly used or misunderstood, they can be major problem areas for the organization and its leaders. Technology within volunteer programs should be seen as powerful tools—ones that can reach new audiences for volunteers, better coordinate the work of current volunteers, and establish much broader recognition within a global audience. To realize the full potential of these tools and their potential contributions to the volunteer resource program, the VRM needs to understand their potential, be familiar with their operating principles, and develop and deploy a plan that engages their potential to better fulfill the organization’s mission.

Program Management

Chapter 13: Volunteer Performance Management: The Impact Wheel
Julie Cross, PhD, and Stephen Hobbs, EdD

The VRM works with volunteers within an organization to create value for the organization and for the volunteer. Managing volunteers often means inspiring their continued contributions and focusing their efforts toward more effective performance. VRMs proficient in the practice of managing volunteer performance begin from the strategic perspective of the organization’s place in the local community and the wider world. The mission of the organization comes to life as the VRM manages volunteers who are engaged in the frontline work of the organization. Leading performance management in a vibrant organization involves growth and change that must be focused and managed effectively. The Impact Wheel highlighted in this chapter provides tools and techniques for the VRM to manage change in a dynamic organization. The authors explain how to use this new model to manage and recognize individual performance at every level of the organization. Their explanations and
discussion, when put into practice, offer enhanced competence in volunteer resource management—with associated tools and techniques—to better ensure that continuous performance improvement becomes an everyday occurrence.

**Digital H: Effective Leadership and Decision-Making**
Nicole LaMee Perez Steadman, PhD

Is it accurate to posit a struggle between the VRM’s roles of program manager and volunteer leader? What is the difference, and how can VPMs use an understanding of their complementary aspects?

The author first explains and explores relevant models of volunteer leadership—LOOP, GEMS, ISOTURE, and the VAL Competence Model—that provide a practical foundation for interactions with volunteers. Understanding the relationship of the model to contributory theory—situational, transformational, and authentic—helps VRMs use and apply theory within practical management.

Integrating leadership theory into a volunteer program requires the understanding, provided by the author, of relevant leadership theories: leader-centered, situational focus, transformational, team-based approaches, and follower-based. The author concludes by discussing practical approaches to putting leadership theory into practice within volunteer management programs and suggests proven strategies to apply theory, implications for decision making and critical thinking, and the importance of emotional intelligence.

**Chapter 14: Risk Management in Volunteer Involvement**
Linda L. Graff, MA

“All volunteer involvement generates risks,” as the author correctly warns in the introduction to this chapter, which covers such areas as:

- Key principles and risk management
- Risk management and liability
- Designing and using a risk management model
- The phases and steps of risk management analysis and planning
- Contributors to successful risk management

Some VRMs may consider risk management to be a lot of work. And at times that may be true. However, the “work” that lies ahead for the imprudent manager when risk is not properly managed may be incalculable. The risk management model outlined by the author will prompt managers to ask the right questions, in the right sequence, and help generate more effective risk management solutions throughout all phases of the volunteer program—and, indeed, throughout the organization.

Few programs of any kind involve no risk at all. And very few risky situations can be managed with only one risk control mechanism. As the author points out, the range of risks facing a volunteer program should be fully evaluated and then systematically correlated to the proper risk reduction approach, thus generating a “constellation of mechanisms” to better manage risk for each situation.

With the understanding provided by this author, combined with the utilities offered by numerous exhibits, tables, and forms, the VRM will be much
better equipped to put in place a comprehensive risk management program that will help make volunteer involvement more productive and satisfying, even as it reduces liability and the probability of losing any future legal action.

**Digital I: Information System Tools for Volunteer Management**

Debra C. Burrows, PhD

Continuing evolution and advances in the field of IT have provided powerful and sophisticated tools, many of which are well suited to more effective leadership and management within volunteer resource management programs and activities. As the author correctly points out, “when used in support of programs that have established good volunteer management practices, these tools can save time, money, and effort. They can improve communication, enhance access to information and resources, and speed up or eliminate tedious processes and in so doing, enhance the experiences of both volunteers and staff.”

Technology resources are not panaceas, however, nor should they be used in lieu of effective management practices or competent management of volunteers. “While information technology tools can be both useful and beneficial, organizations must assess their costs in light of the advantages to be gained, the availability of funds, and the specific needs of their own staff members and volunteers.”

The focus of this chapter is primarily on information systems that offer particularly useful capabilities to support effective volunteer resource management practices and the leaders and managers who have those responsibilities.

After reviewing the information system tools available to support volunteer engagement, the author turns to those tools that offer great potential in such volunteer management areas as training, retention, evaluation, and reporting. An important concluding section of this chapter involves the author’s discussion of challenges facing VRMs in information system planning and management. The chapter concludes with the author’s recommendations regarding the foundations for information systems that should be put into place to help better ensure program success, including the assemblage of a knowledge base. Information systems offer numerous tools that are particularly suited to volunteer resource management. While information systems are not necessarily the right tool for every organization, they certainly are worthy of serious consideration. This chapter provides readers with important information needed for such consideration.

**Digital J: Executive and Managerial Coaching in Nonprofits: Critical Leadership Development**

Milena Meneghetti, MSc, CHRP, Registered Psychologist

Volunteer managers operate within a complex, diverse, and ever-changing landscape. Globalization, technological advances, and the continuing off-loading of government services to the not-for-profit sector create new challenges for volunteer manager. Increasing demands for professionalism and accountability by volunteer managers put their work under more scrutiny, and rightly so. All of these factors have resulted in ongoing and meaningful efforts to train and credential managers of volunteers.
Postsecondary institutions are now offering degrees in nonprofit management, and national and international bodies are providing important opportunities for professional development for volunteer managers. However, these efforts to develop volunteer managers throughout their careers are able to go only so far. The new climate has created a new need: for access to timely, personalized support in real time that goes beyond the traditional efforts typically used to develop leaders.

Managerial coaching by an external coach is a timely and appropriate addition to the range of leadership development options available to the volunteer manager. This chapter introduces and describes the process of external coaching as it applies to volunteer managers. The chapter includes detailed guidelines for finding an external coach as well as a description of what it is like to be coached, from the client’s perspective.

Part III: Results and Evaluation

Chapter 15: Evaluating the Volunteer Program: Contexts and Models
Jeffrey L. Brudney, PhD, and Tamara G. Nezhina, PhD

The nature of volunteer programs, including how they are evaluated, is changing rapidly in response to continuing shortages of resources and funding sources continually stressing increasing organizational effectiveness and accountability for grants, contracts, financial support, and program results. These constituencies and stakeholders expect to know the outcomes and long-term impact of their involvement and/or resources. The authors present an evaluation framework designed to assist the VRM by providing a better understanding of the various types of evaluation they can use based on stakeholder involvement. They describe how volunteering might be seen and valued by host organizations and other interested groups and present a logic model framework to guide volunteer program evaluation.

Rarely indeed can a single evaluation meet the information needs of all stakeholders in a volunteer program. Clearly, choices have to be made regarding the purpose of the evaluation and its fit with the stakeholders for whom it is intended. The authors conclude with a discussion of the various options available to VRMs planning to conduct evaluations on their volunteers and programs. Not only do the authors outline the fundamental tools of volunteer program evaluation, but they provide excellent guidance regarding their systematic use.

Chapter 16: Evaluating Impact of Volunteer Programs
R. Dale Safrit, EdD

Volunteer program evaluation (measurement) is among the most critical components required for effective program management and in the challenging area of documenting the impact and value of the program on the clientele for whom it is designed as well as the larger society in which the organization operates. Volunteer programs are intended to generate positive impacts and results in the lives of the clientele for whom they are designed and intended. This goal requires the volunteer manager to constantly gauge the focus of the volunteers and the programs in which they are engaged to
ensure they are having their intended impact on the organization’s mission fulfillment. Impact evaluation provides the process and tools needed to assess and evaluate volunteer program contributions to mission fulfillment.

The author discusses the critical elements needed to measure program objectives, including:
- The need to evaluate
- Collecting the required impact evaluation data and information
- Determining accountability requirements and processes
- Monetizing impact
- Comparing costs and benefits in various volunteer program
- Communicating the evaluation findings

Part IV: Applied Management Practice

Digital K: Mission Fulfillment (Even During Challenging Times)
Brian P. Higley, PhD, Martin Heesacker, PhD, Brian J. Mistler, PhD, and Justin Farinelli, BS

Many organizations, teams, and individuals work very hard to develop mission and vision statements—yet almost everyone believes that they typically do not “live” these statements extremely well. Each year, a lot of valuable time and energy go into developing mission statements that will quickly be forgotten or ignored in the often-frantic day-to-day activities that follow. And here is the kicker: Most people know that they will not fulfill their mission statements even as they spend valuable time developing them. Yet we continue to develop mission statements (both personal and professional) while recognizing, deep down, that most of them will not be fulfilled very well. What is going on here—and how can we stop wasting valuable time, energy, and money developing statements that will not be fulfilled?

The authors focus on assessing the latest practices, tools, and technologies for their utility in optimizing the performance of VRMs. Computer-based systems remain the focus of their review and discussion that assesses the degree to which managers and leaders are able to achieve previously developed goals that are critical to the mission and objectives of the nonprofit. They provide a thought-provoking overview of mission fulfillment best practices based on behavioral science. Following an assessment of current computer technology products that track goal achievement, the authors focus on the science-based mission fulfillment best practices they have developed as part of their collaborative efforts.

Digital I: Ethics: Professional Ethics for Volunteers
Joan E. Pynes, PhD

The administration of volunteer programs is a critical component of strategic human resources management. Volunteers, in addition to paid staff, are the human resources of an agency. As such, volunteer administrators and human resources management administrators (if they are different individuals with different responsibilities) must work together to develop a strategic human resources management system for the
nonprofit. In addition to developing a strategic human resources management system for the nonprofit, they must go beyond the technical aspects of strategic human resources management and inculcate and reify ethical administrative practices. The chapter provides a brief review of strategic human resources management and then discusses codes of ethics governing human resources management, the nonprofit sector, and the management of volunteers. It concludes by acknowledging some of the knowledge, skills, and other characteristics needed by volunteer administrators.

**Digital M: Professionalism and Credentialing in the Field of Volunteer Management**

Lawrence Ullian, EdD and CVA, and Anne B. Schink, CVA

Volunteer resource management continues to play an ever more pivotal role in whether a NPO is able to achieve mission fulfillment. Clearly, professionalizing the field of volunteer resource management is important to current and future practitioners, but perhaps more important, it benefits every client, volunteer, stakeholder, and community served by the voluntary action organization. The authors make a strong case that the manager of volunteer resources has a number of options available that lead in the direction of improving professional competence and status.

After providing a historical perspective, the authors establish a framework for professionals in volunteer management that includes models and conceptions relating to the field. A competency-based framework explains the knowledge, skills, and abilities needed by managers of volunteers; a novice-to-expert continuum; and the process of transforming managers of volunteer resources. The credentialing certification process is outlined from definition and core competencies to experience-based requirements. The authors conclude with a discussion of what it means to be considered a professional and what it takes to be a competent, confident, and professional manager of volunteer resources.

**Digital N: Advocacy in Volunteer Management**

Anne B. Schink, CVA, and Lawrence Ullian, EdD, CVA

In the earliest days of the Latin language, Romans combined the words “vocare” and “ad” to create the word “advocate,” meaning to call or summon. Today its extended meaning includes speaking in favor of, pleading on behalf of another, or supporting and defending a cause. Further, that meaning of “speaking on behalf or support of” has been combined with a core value (creating and sustaining a better quality of life for society) to become a major function and role for many of America’s millions of NPOs.

Nonprofits are perhaps the most pervasive and involved institutions participating in the American public policy process. They are involved in such widely diverse activities as national politics, designing or changing public policies, and evaluating or passing judgment on an enormous variety of public policies ranging from scientific and economic to educational and cultural. These organizations and their leaders speak out—advocate—because they must be true to their individual and organizational core values and to fulfill
their role as agents on behalf of their chartered public purposes—to protect, defend, and improve the quality of life for those who cannot do so for themselves. Their specific advocacy roles—behaviors, functions, or activities—are as varied as the range of public purpose services provided by organizations in the independent sector. The authors emphasize the importance of finding and using one’s own voice to speak up about personal professional development, the volunteer program, participation in management and leadership roles, community engagement as a manager of volunteers, and the role as a spokesperson for the causes that your organization espouses.

Volunteers are among the most effective advocates a nonprofit can use in that area of public service mission fulfillment. While there are a number of legal and regulatory to be considered, as the authors explain, no nonprofit should be intimidated about advocating for its policy and program goals, and doing so often includes effective use of its corps of volunteers. As the authors explain, “educating the public and elected officials are essential elements of ensuring long-term support. Volunteerism often follows the model of meeting immediate, critical social needs, gradually evolving into social change and reform efforts aimed at ending the conditions that led to the problem in the first place, or advocating for self improvement efforts directed at overcoming adversity. In the end, active participation of citizens in public life and government becomes civic engagement…. Ensuring the sustainability of democratic institutions and protecting the civil liberties of all citizens.”

Digital O: National, State, and Local Community Programs for Volunteer Resource Managers
Kristin Callazzo Hodgson, CAE

National, state, and/or regional support programs can be important resources for VRMs in such areas as recruiting, volunteer support, training, financial resources, and information portals. The author reviews a variety of resources and support programs ranging from social media and important Web sites through which volunteers can be recruited, to national programs and how to find the resources they offer. A discussion follows of considerations and benefits attached to establishing a volunteer portal on the nonprofit’s main Web site.

Another important discussion is that of what resources should be expected and explored at the state and local levels. The author concludes by emphasizing the fact that the VRM position will continue to change in response to its mandate to help fulfill the needs of the organization. “Knowing when and where to find tools to help you along the way will play a big part in your success as a volunteer manager,” the author points out. “Keep in mind these basic tips and you are sure to be a success!”

Digital P: Volunteer Management: Hospice Organizations
Ginny Burns, CVA

“Every hospice patient and family situation is unique and hospice care celebrates the uniqueness of each patient’s care,” the author points out. “[E]very request for volunteer support will present unique opportunities and
challenges to the volunteer manager…. The workday is constantly changing. The work is intense, but it stays fresh. There is never a time when a hospice volunteer manager can say ‘Now I have seen it all.’ Sadness trickles through each day, but laughter and hope flow freely.”

The author thoroughly and eloquently covers the specific field of hospice volunteer management from organizational environment, recruiting hospice volunteers, screening and interviewing potential volunteers, orientation and training of hospice volunteers to appropriate assignments, supervision, evaluation, risk management, hospice volunteer recognition and retention, and potential stressors facing hospice VRMs.

The author concludes by explaining: “Lives end, but life is celebrated daily. Good people show up to do hard, meaningful, humane work—easing the pain of others. The hospice volunteer manager gets to walk each day with those special people and share in those celebrated lives. What a gift!”

**Digital Q: Volunteer Resource Management in Local Development Organizations: An International Perspective (Portugal)**

Timothy L. Koehnen, PhD

The author focuses on volunteer resource management as practiced within international local development organizations. He points out, however, that many of these organizations do not have organizational cultures or experience to adequately support volunteer resource management system. More emphasis on planning and management of volunteer resources and engaging volunteers is essential if volunteer competencies and effectiveness are to be improved in such areas as leadership, strategy and operations.

The author considers and discusses various components of organizational involvement including

- Organizational culture
- Role analysis
- Volunteer identification
- Recruitment and selection
- Management and supervision
- Logistical support
- Performance appraisal
- Voluntary recognition and rewards
- Performance appraisal and feedback
- Organizational tools

He includes a personal critique of traditional methods and critical incidents experienced in this process. The chapter closes with questions designed to stimulate further discussion and self direction.

**Digital R: International Volunteer Management**

Marilyn K. Lesmeister, PhD, Pamela Rose, PhD, and Erin Barnhart, PhD Candidate

This chapter reviews the definitions, history, structure, and impact of international volunteer programs and resource management issues they face. The authors provide a variety of examples that represent programs that are both transnational and specific to countries on each continent.
In addition, the authors specifically discuss use of volunteers in the context of international programs, comparing and contrasting international youth civic engagement.

Following a discussion of the global meaning of international volunteerism, the authors discuss a variety of categories within international volunteerism, including altruism, personal transformation, skill building, being asked, and a combination of value and vacation. Volunteering around the world is discussed with examples of noteworthy programs and how they are influenced by governments, religions, and other institutions. The structure of volunteer resource management is affected by the sometimes unique requirements of international volunteerism. The authors discuss such specific areas as recruitment, selection, orientation, training, and partnerships that might be helpful. Following a discussion of international use of volunteers in such areas as globalization, social justice, and mutual benefit, the authors compare and contrast these programs. Finally, they review the impact of international volunteer programs from various aspects, including personal, professional, disadvantage, economic, and social capital.

Quo Vadis, Volunteer Resource Management

In the early 1990s, circumstances led me to meet and study with Dr. W. Edwards Deming, one of our most noted statisticians, authors, and teachers, a man who often is credited with rejuvenating both the Japanese and American economies through his insistence on process improvement and product quality. “Man’s job,” he said, “is to govern the future, not simply be a victim of the wind blowing this way and that way. I know, the best plans are upset. But, without a plan there is no chance. Best efforts will not do it” (quoted in Connors, 2001, p. 3).

Whether we plan on it—or for it—or not, there will be a future for volunteer resource management and professional development. We have an essential choice: We can attempt to influence the future of this evolving area of management through vision and planning, or we can let the winds of change blow us this way and that. Without a vision and a plan, we have little chance of affecting whatever outcome lies ahead. Our contributors have shared their hard-earned experience and knowledge with you in this handbook to provide you as professionals, practitioners, researchers, and students of volunteer resource management with the tools and understanding you will need to use the winds of change in this field to your advantage—and to the benefit of those you serve.

References


PART I

Volunteer Resource Program Assessment, Analysis, and Planning

Organizational Assessment and Planning

Chapter 1 Volunteer Models and Management
Chapter 2 Volunteer Demographics
Chapter 3 Preparing the Organization for Volunteers
Digital A Volunteer Management of Governance Volunteers
Chapter 4 Shaping an Organizational Culture of Employee and Volunteer Commitment
Digital B Understanding the Changing Organization as a Primary Context for Volunteering
Digital C Organizational and Programmatic Benefits from Adversity: Comprehending the Centrality of the Role of Adverse Experiences in and on the NPO and Its Programs

Operational Assessment and Planning

Chapter 5 Maximizing Volunteer Engagement
Chapter 6 Assessment, Planning, and Staffing Analysis
Chapter 7 Policy Development for Volunteer Involvement
Digital D Options for Volunteer Involvement
Digital E Managing Voluntourism
This chapter introduces and defines the concept of volunteer management. Historical models of volunteer management are described, culminating in an in-depth description of the only model of contemporary volunteer management based on empirical data collected from actual volunteer managers, the PEP Model of Volunteer Administration: (Personal) Preparation, (Volunteer) Engagement, and (Program) Perpetuation.

Volunteers and Their Essential Management

The social phenomenon of volunteerism has had enormous positive effects on individuals, their families and communities, and entire cultures for well over two centuries in the United States and for at least half a century in western Europe and other areas around the globe (Ellis & Noyes, 1990; Govaart, van Daal, Münz, & Keesom, 2001; Jedlicka, 1990). Even in times of national economic slowdowns, individuals continue to readily give their time, energies, and talents to other individuals and groups (other than family members) with no expectation for financial remuneration (Gose, 2009). And while informal volunteerism continues to thrive at the individual and grassroots organizational levels, steady numbers of individuals also continue to volunteer within formal programs and organizations. The United States Department of Labor Bureau of Labor Statistics (2008) concluded that during the 12 months...
between September of 2007 and 2008, almost 62 million people volunteered for formal organizations in the United States; this roughly corresponds to almost 27% of the population aged 16 and over. Most volunteers were involved with either one or two organizations—68.9% and 19.8%, respectively.

In today’s complex society and era of rapid social and technological change, it is essential that formal programs and organizations engaging volunteers do so within a logical, holistic, systematic process that maximizes a volunteer’s impacts on the program’s/organization’s clientele being served while minimizing inconveniences and demands on the volunteer as an individual. While it is important to consider and respect each volunteer as a unique individual, large numbers of volunteers focusing on a single clientele or working within a single program require a higher level of organizational coordination in order for the organization to meet its mission and fulfill its commitments to the volunteers served. Thus, it is essential that all formal volunteer-based programs and organizations develop a consistent and logical approach (or model) to engaging and sustaining (or managing) volunteer involvement. (In actuality, we would argue that even informal volunteer initiatives would also benefit from a logical and consistent approach to engaging and sustaining volunteers, but that is a discussion for another time and place.) This chapter explores the concept of volunteer management, both historically and today, and its essentials components.

**Concept of Management**

Any discussion of volunteer management must begin with a discussion of the foundation concept of management itself. According to Kreitner (1998), “Management is the process of working with and through others to achieve organizational objectives in a changing environment. Central to this process is the effective and efficient use of limited resources” (p. 5). Kreitner further identifies eight fundamental management functions that also readily apply to volunteer programs and organizations:

1. **Planning** “is the formulation of future courses of action” (Kreitner, 1998, p. 14). Paid staff in volunteer organizations must plan for the services and/or programs offered to clientele. And, of course, they must also plan how to identify, engage, and sustain the volunteers involved in delivering the services and/or programs. Serafino (2010, p. 104) concluded that “[p]lanning is a complex activity [in volunteer organizations], perhaps made more complex by the involvement of volunteers.”

2. **Decision making** involves managers “choosing among alternative courses of action” (Kreitner, 1998, p. 15). In volunteer-based programs, decisions must be made regarding which clientele to serve, how to best serve them, and which volunteers to accept into the organization. Yallen (2010) specifically discusses the need for volunteer administrators to be competent in making ethical decisions.

3. **Organizing** involves “structural considerations such as the chain of command, division of labor, and assignment of responsibility” (Kreitner 1998, p. 15). Managers in volunteer organizations must decide which paid staff member will be responsible for managing the organization’s volunteers, to whom that individual will report, and if that will be a full-time responsibility or if the individual will also have additional professional responsibilities (e.g., fundraising, marketing, etc.)
Peach and Murrell (1995) discussed a systems approach to organizing in volunteer organizations and concluded that “replicating current cutting-edge organizing models will lead to…evolving even more innovative organizational models unique to the volunteer worker culture” (p. 232).

4. **Staffing** “consists of recruiting, training, and developing people who can contribute to the organization” (Kreitner, 1998, p. 15). In volunteer organizations, staffing applies to securing and managing both paid staff and volunteers. Krywood (2010) provides an excellent discussion on staffing within volunteer organizations.

5. **Communicating** involves “managers…communicating to their employees the technical knowledge, instructions, rules, and information required to get the job done” (Kreitner, 1998, p. 15). Volunteers are a critical second targeted group for communications in a volunteer organization. Macduff (1995) discussed the critical role of communications in volunteer organizations and concluded that “[v]olunteers and [paid] staff need policies, procedures, and structures that permit and encourage them to communicate” (p. 210).

6. **Motivating** involves encouraging “individuals to pursue collective objectives by satisfying needs and meeting expectations with meaningful work and valued rewards” (Kreitner, 1998, p. 15). The topic of volunteer motivation has been well studied and commented on for decades. An entire issue of the *International Journal of Volunteer Administration* is dedicated to the topic of volunteer motivation (e.g., Finkelstein, 2007; Littlepage, Perry, Brudney, & Goff, 2007; Starnes, 2007; Yoshioka, Brown, & Ashcraft, 2007).

7. **Leading** involves managers “serving as role models and adapting their management style to the demands of the situation” (Kreitner, 1998, p. 15). Managers of volunteers are very often directly engaged along with volunteers in delivering services or programs to clientele, thus serving as role models. Varella (2010) concluded that leaders in organizations engaging volunteers “must fully appreciate how their own leadership abilities help foster the motivation of volunteers” (p. 434).

8. **Controlling** involves “managers [comparing] desired results with actual results and [taking] necessary corrective action” (Kreitner, 1998, p. 15). The concept of “control” is sometimes considered a negative concept wherein one individual attempts to maintain power (or “control”) over another individual or group of individuals. In reality, controlling is readily practiced in volunteer programs and could better be considered under the more widely used term of “supervision.” Volunteer managers sometimes must decide that an individual’s involvement as a volunteer is no longer in the best interest of the clientele served, the volunteer, and/or the overall organization and subsequently must take corrective action (Herman, 2010); this is only one example of control in a volunteer organization. Practices involving fiscal management (Kerr, 2010) and quality improvement (Alaimo, 2010) are other examples of controlling in volunteer organizations.

### Concepts of Volunteer and Volunteerism

The second foundational concept in volunteer management that must be defined along with the concept of management itself is, of course, the concept of volunteer
(or volunteerism). The literature is replete with myriad individual approaches to and definitions of both of these social phenomena, some of which are controversial (Brudney, 1999). As early as 1967, Naylor identified volunteers serving as a committee or board member as administrative volunteers and those that provided direct service to others as operational volunteers. Park (1983) suggested that “the heart of volunteerism is the countless individual acts of commitment encompassing an endless variety of... tasks” (p. 118), while Smith (1989) considered a volunteer as anyone who reaches out beyond the confines of their paid employment and their normal responsibilities to contribute time and service to a not-for-profit cause in the belief that their activity is beneficial to others as well as satisfying to themselves. Safrit, King, and Burscu (1994) defined volunteerism operationally as “giving time, energies, or talents to any individual or group for which [the individual] is not paid” (p. 7).

Space in this chapter does not provide for an exhaustive discussion of these concepts. Rather, we basically adhere to Safrit, King, and Burscu’s (1994) operational definition of “volunteer” and to Merrill and Safrit’s (2000) conclusions that a “volunteer” is anyone who performs “volunteerism” and that any contemporary definition of volunteerism involves four fundamental tenets:

1. Volunteerism implies active involvement.
2. Volunteerism is (relatively) uncoerced.
3. Volunteerism is not motivated primarily by financial gain.
4. Volunteerism focuses on the common good.

Defining “Volunteer Management”

The ultimate purpose of the discussion in this section is to arrive at a contemporary definition of the process through which an individual (paid or unpaid) may most effectively and efficiently coordinate the contributions of individual volunteers seeking to help a formal organization or agency fulfill its mission. Consequently, and based on the management and volunteerism literature, we define volunteer management as the systematic and logical process of working with and through volunteers to achieve and organization’s objectives in an ever-changing environment. Central to this definition is the effective and efficient engagement of volunteers as human resources who are respected and valued for both their individual and collective contributions toward the organization’s mission and vision. (Of course, this conceptual definition of volunteer management would involve various fundamental subconstructs or components that would operationally define the concept in greater detail while synergistically contributing to the overall concept’s definition.)

The individual who manages volunteers within these parameters is logically called a “volunteer manager” or “volunteer resource manager.” This individual may be a paid or unpaid staff member. (However, the former term often is discouraged in some contemporary associations involving paid managers of volunteers since to the uninformed, “volunteer manager” could be interpreted as a volunteer managing any aspect of the organization’s operations or programs.) If that individual is a paid staff member who also performs administrative duties involving policy development or implementation regarding the volunteers being managed, or has fiduciary responsibilities regarding the volunteers’ involvement in the organization, then the term
“volunteer administrator” could likewise apply. In their exhaustive Internet search of the literature, Brudney and Heinlein (2010) found nine separate titles used to describe professionals and practitioners in this field, including volunteer manager and volunteer administrator as well as administrator of volunteers, volunteer coordinator, coordinator of volunteers, manager of volunteers, director of volunteers, volunteer director, and community organizer.

Review of Major Volunteer Resource Management Models

Volunteer management has evolved as societies continue to change, requiring new strategies to meet the emerging needs of people in communities around the world through volunteerism. In the United States, from the early days of neighbors helping neighbors to the current virtual volunteering, volunteerism has played an important role in helping address the nation’s challenges (Ellis & Noyes, 1990). In addition to the emergence of national service as a catalyst to increase volunteer engagement, strategic initiatives to engage baby boomers, college students, families, and virtual volunteering have all contributed to the growth of volunteerism in the United States. In fact, in 2009, 1.6 million more individuals volunteered than during the previous year (Corporation for National and Community Service, 2010). While still considered a relatively young profession, volunteer management nonetheless has played an important role in the evolution of volunteerism around the world and will continue to be important as more people volunteer and new strategies are introduced to engage individuals as volunteers. Historically, managers of volunteers have accepted responsibilities related to the identification, selection, orientation, training, utilization, recognition, and evaluation of volunteers, commonly referred to as ISOTURE (Boyce, 1971).

In her 1967 book, *Volunteers Today: Finding, Training and Working with Them*, Harriet Naylor was the first author to publish a text that focused on volunteer management. Following Boyce’s seminal work of connecting leadership development to volunteer engagement, numerous authors and practitioners have suggested specific yet varied requisite foundational knowledge and skills for the effective and efficient administration of volunteer programs (Brudney, 1990; Culp, Deppe, Castillo, & Wells, 1998; Ellis, 1996; Fisher & Cole, 1993; Kwarteng, Smith, & Miller, 1988; Navarre, 1989; Penrod, 1991; Safrit, Smith, & Cutler, 1994; Stepputat, 1995; Wilson, 1976). In-depth and thorough reviews of each of these works have revealed similarities and disparities among the authors’ ideas regarding volunteer management competencies as well as similar findings and/or suggestions concerning the needed competencies for managers of volunteer programs to be successful (Safrit & Schmiesing, 2004, 2005). The remainder of this section provides an overview of the more popular models that have been used and adopted in the United States and around the world by volunteer managers.

Naylor (1967)

organizations which require the unpaid work of citizens in administration and program services. Such citizen volunteers may serve in meeting need for subsistence, health, education, cultural and aesthetic experience, and social acceptance” (p. 8). While Naylor never actually used the term “volunteer management” or “volunteer resource management,” she described the critical components of a plan for the development of volunteer leadership in organizations wherein paid and volunteer staff work hand in hand to fulfill the mission of the overarching organization. Naylor’s approach to volunteer development included seven critical components:

1. An inventory of jobs
2. An inventory of volunteers
3. A recruitment plan
4. A selection and placement process
5. Induction and supervision
6. A comprehensive and unified training program
7. Provision for volunteer mobility (i.e., volunteers leaving their position and the organization)

Regarding the two components inventories of jobs and volunteers, Naylor emphasized “analyzing the work to be done [by volunteers] and dividing it into person-sized parts” (1967, p. 174) correlated with the “registration of all active individuals and a continuing record or prospects and new recruits to be matched against the jobs and vacancies discovered” (p. 175). As far as we can determine, Naylor was the first author to publish actual written volunteer job descriptions, one for what she termed “administrative volunteers” and a second for “program volunteers” (pp. 82–83). Following her two initial components was the development of a recruitment plan that used “an individualized approach, concentrated on [finding] particular individuals to fill specific vacancies” (p. 175). Selection and placement emphasized that “enough time and enough information must be available to the advisory staff and to the person appointing for both of them to consider carefully the qualifications of candidates and their potential for a job that is vacant” (p. 176). Induction and supervision ensured that a new volunteer was adequately introduced to the sponsoring organization and that the volunteer and supervising staff shared responsibility for the volunteer’s continued success with the given task. Naylor was again the first author to publish standard volunteer training plan components involving the sequencing of volunteer training, actual teaching methods appropriate for volunteers, and considerations for approaching volunteers as adult learners. Finally, “a carefully individualized process for [volunteer] promotion, transfer, and separation of volunteers from the job” (p. 178) addressed the mobility of volunteers both within the organization and among volunteer organizations. Naylor emphasized the importance of formal exit interviews and referrals when a volunteer decided to leave the organization, for whatever reason.

Boyce (1971)

One of the most highly recognized models of volunteer resource management was first proposed by Milton Boyce in the early 1970s. Boyce’s work provided a much-needed framework for the profession and originally was implemented through the
national Cooperative Extension Service system. The model adopted by Boyce with a focus on volunteerism as leadership development was originally developed by Dr. Robert Dolan, professor of adult education at North Carolina State University. Importantly, Boyce stated that “the leadership development process is a systematic approach whereby individuals are offered the opportunity to increase their ability to influence the behavior of members of a social group” (1971, p. 3). Although it is a systematic process, it should be noted that “the leadership development process is continuous and this model is only a guide, not a prescription” (p. 15).

The model, commonly referred to as the ISOTURE model, introduced the management concepts of:

1. **Identification.** The process of finding people who have the competencies and attitudes essential to fill specific leadership positions
2. **Selection.** The process of studying the backgrounds of those potential leaders identified and desired, and motivating them to fill selected positions
3. **Orientation.** The process of orientating those leaders selected in the role expectations of the leader position
4. **Training.** The process of stimulating and supporting leaders’ efforts to acquire knowledge and to develop attitudes and skills that will improve the quality of their performance in leader positions
5. **Utilization.** The process of providing the opportunity for leaders to put acquired knowledge and skills into action in the most appropriate way, and provide them an opportunity to function
6. **Recognition.** The process of recognizing and rewarding sound leader performance
7. **Evaluation.** The process of determining results of leader performance

Like many authors who have come after him, Boyce emphasized evaluation but pointed out that “evaluation must be used to appraise the behavior of the volunteer leader since one of the goals of leader training and leader utilization is to provide growth in the leaders themselves” (1971, p. 15). The focus on the growth and development of the volunteer leader was unique at that time, and we could argue that it still is unique today.

While published nearly 40 years ago, Boyce’s model of volunteer management provided the foundation for the volunteer management profession. The ISOTURE approach to volunteer leader development suggested seven subcategories inherent in volunteer management that remain relevant today and may be found in many, if not all models, that followed his work. Using Boyce’s conceptual model more than two decades later, Safrit et al. (1994) developed **BLAST: Building Leadership and Skills Together**, a volunteer management curriculum targeted toward 4-H Youth Development professionals. This resource, utilized extensively across the U.S. Cooperative Extension Service, includes tools, resources, and worksheets for the volunteer manager.

**Wilson (1976)**

One of the first to emerge with a focus on the salaried volunteer administrator of volunteers, Marlene Wilson proposed the necessary components for paid staff to be successful and have an effective program engaging volunteers. Wilson placed heavy
emphasis on the humane aspects of a management model and stressed the importance of the organizational climate that volunteers would be experiencing. The paid staff member has significant influence over the climate in an organization, and it is important that the volunteer resource manager focus on the nine dimensions that define climate that were originally proposed by Litwin and Stringer (1968). Wilson suggested strategies that might influence climate, including how an administrator might create an achievement-, affiliation-, or power-oriented climate. It is clear in her work that Wilson, popular management and leadership functions applied to the role of the paid administrator were keys to creating the right culture and climate for volunteers, paid staff, and service recipients. In her model, Wilson relied heavily on management theory and practices from such authors and practitioners as Peter Drucker, Ken Blanchard, and Paul Hersey.

Wilson applied the theory of motivation to the functional steps of recruiting, interviewing and placing, supervising, and retaining volunteers. She stressed the importance of recruiting potential volunteers in a manner that highlighted the importance of their motivational factors. The interview stage provided the first real, in-depth opportunity for the paid administrator to determine the needs and goals of the potential volunteer and if they were congruent with those of the organization. Wilson suggested that it was important to understand if people are achievement, affiliation, or power oriented as that motivation greatly influenced the administrator’s decision making and further advanced the notion that not one model fits all volunteers. Finally, retaining volunteers was closely tied to the reward and recognition structure of the organization. Understanding the motivation of individuals and groups would greatly inform the management functions and how they were applied in the volunteer setting.

Brudney (1990)

Jeffrey Brudney suggested steps that focused on mobilizing volunteers for public service in communities, basing a great deal of his discussion and recommendations on the results of the U.S. Small Business Administration (SBA) Service Corps of Retired Executives (SCORE Association) study published in 1988. Growth in volunteerism in public services had been driven by several factors, including calls from public officials and the fiscal climate at the time of the book’s publication, which was remarkably similar to today’s environment. Additionally, Brudney identified the increasingly positive relationships between public administrators and citizens at the local level, resulting in increased volunteer rates through public programs. Regardless of the reason, it was important that volunteer managers in the public sector recognize the importance of formally managing volunteer programs.

Brudney identified the internal work that must be done to prepare for a successful volunteer program. Public sector entities must:

1. Identify reasons to have volunteers and the needs within the organization to improve services.
2. Gain employee perspectives and buy-in.
3. Develop a sound organizational structure, including housing the program.
4. Identify a director of volunteer services to provide overall leadership.
Once this initial preparation work has been completed, the agency is ready to develop the core components that would lead to successful volunteer engagement.

Brudney outlined the core components that must be developed and implemented, including the position description and recruiting, screening, placing volunteers, educating, evaluating, and recognizing volunteers. An additional and important component advocated by Brudney was the training of employees in volunteer management and supervision that was highlighted by Walter (1987), who indicated that there was little in the background of the public employee that would support their success in volunteer management. Education and training provided to employees was a significant strategy to help overcome resistance that was likely to emerge.

A major part of Brudney’s work was also devoted to the concept of the costs and benefits of having a volunteer program. Brudney advocated the importance of understanding these two concepts along with the potential pitfalls that may be encountered by the public agency. The displacement of paid employees, especially during an economic crisis, was (and still is) a critical issue for public agencies (really all agencies) to fully understand. To evaluate the cost effectiveness of a volunteer program, Brudney outlined a six-step process and applied it to the SCORE program as an example.

A concept that Brudney incorporated into his work was how volunteers can improve service quality and impact. To that end, Brudney emphasized the service performance of volunteers and how important it was that they were trained and educated, in an effort to avoid poor performance that may lead to lack of impact. Volunteers could contribute significantly to an organization’s performance and outreach in communities, especially in those situations where public agencies did not have, nor ever had, funds to hire paid staff.

Penrod (1991)

Kathryn Penrod developed the L-O-O-P model of volunteer management with a focus on the concepts of locating, orientating, operating, and perpetuating volunteers and volunteerism. Built on these four concepts, Penrod suggested that they are not independent of each other but rather blend together with each being integral to the overall success of the total model. The locating concept addresses the steps of volunteer recruitment and selection and the important considerations that these steps involved. The location step of the model focuses on matching the organization’s needs with the individual volunteer’s skills and interests. Additionally, through the selection process, it is important to determine the potential volunteer’s needs and match those with organizational needs.

The orientation step of the L-O-O-P model focused on strategies to educate the new volunteer, including formal and informal processes. Potential or new volunteers have many ways to collect information about an organization, including newspapers, printed brochures, electronic media, talking with others, and questions asked during their initial inquiry about volunteering with the organization. The formal process of orientation is more structured and includes the explanation of the organization’s rules, policies, by-laws, and standard operating procedures. While the organization may controlled the formal orientation, they do not control the informal processes
and must recognize that individuals do not always interpret information received as it is intended by the organization.

Penrod introduced the term “operating” when referring to volunteer engagement, the impact that volunteers have in communities, and the impact of volunteering on a volunteer’s individual growth. Penrod indicated that it is important that volunteers know that their service is meaningful and that they have an impact. The educational process began during the orientation phase but continued throughout a volunteer’s tenure with the organization. Penrod believed that the learning processes in which the volunteers are engaged (e.g., new ideas, meeting new people, learning new methods, etc.) are forms of payment for their service. Also included in this component were the accomplishments of the volunteers and the opportunity for them to be engaged in service that is meaningful to the organization, service recipients, and themselves. It is important that the leader of volunteers recognize the accomplishments of volunteers since they may not also acknowledge this fact or recognize the importance of highlighting the accomplishments.

Perpetuating the involvement of volunteers is a concept with which Penrod concluded the L-O-O-P model; it consists of the evaluation of the volunteer experience and recognition for a volunteer’s efforts. Evaluation is an important but difficult task, but it must be completed, focus on the tasks completed by the volunteer, and be constructive in terms of the feedback provided. Penrod, like many others, suggested that recognition be consistent with the desires of the individual volunteers and be varied to meet the needs of many. Most important, perhaps, is that the L-O-O-P model suggests that recognition of volunteer efforts should be done throughout a project, and not simply at the conclusion of the project or program year.

Fisher and Cole (1993)

James Fisher and Kathleen Cole recognized the importance of professional development of the volunteer manager since so many were coming into the profession with little previous experience or education directly related to their position’s responsibilities. The authors identified and raised the importance of the leadership functions of a volunteer manager; a leader must set direction, encourage others to buy into the direction, and inspire others to become engaged and support the direction/vision. Fisher and Cole incorporated the work of Bennis (1987), who identified key aspects of leadership, including: the leader as a visionary, sharing the vision, fulfilling the vision, and the leader as an advocate. Additionally, Fisher and Cole identified managerial functions important to the volunteer manager and the importance for nonprofit and volunteer organizations to adopt sound management functions.

Fisher and Cole suggested that both personnel management and program management functions were important to the role of the volunteer manager. Personnel management focuses on the identification of volunteer roles and preparing the organization to engage volunteers. Functionally, the manager must work with other units and departments in the organization to identify tasks for potential volunteers and then work with other paid staff supporting the service of volunteers once they are engaged. Additionally, volunteer managers play a key role in relationships within the organization and the community. Program management functions include the ongoing staffing operations and budgeting and fiscal issues that are important to the
success of volunteer programs. Overall, the volunteer manager has broad responsibilities for the climate in the organization to ensure that others were prepared from leadership and management perspectives to engage volunteers.

Training and development are critical to the success of the volunteer program in the Fisher and Cole model. Volunteers come to organizations with varying levels of experience and knowledge; thus, it is imperative for the organization to prepare the volunteers to serve in specific roles. Volunteers must learn about the organization, their specific volunteer position, changes and transitions that are likely to take place, and different opportunities for increased responsibility. Supervising volunteers, as others have indicated, is not a one-size-fits-all model. Volunteers have different needs, desires, interests, and motives, and each needs to be considered when designing a supervision strategy within an organization. Volunteer managers need to know if their organization is centralized or decentralized; this helps determine if one or more paid staff would supervise volunteers or if the structure requires volunteers to supervise volunteers. Regardless of who is supervising volunteers, the training, education, and support for those individuals is important and essentially a requirement for it to be successful.

Demonstrating the value of volunteer programs is the final component of the model proposed by Fisher and Cole. The focus is on evaluation and understanding that it may be on the process, the results, or the overall impact of volunteer engagement. The authors described the essential components of an effective evaluation, including the need to identify the goals of the evaluation, who/what to evaluate, data collection strategies, qualitative versus quantitative data analysis and ultimately communicating the results.

Fisher and Cole (1993) stated that “a discussion of the professionalization of volunteer administration often focuses on two major parts: the feasibility of professionalization and the advisability of professionalization” (p. 165). They recognized that the field of volunteer management is broad and the benefits/costs of professionalization are difficult to ascertain. A strong knowledge base, standards for entry into the profession, standards for practice, a distinctive subculture, and awareness in which the public is apprised of activities are important for the professionalization of volunteer management. Volunteer managers should develop their own personal philosophy of volunteer involvement. In addition, their perspectives and philosophies are also important catalysts and influences within their organizations as they evolve and deploy the organizational volunteerism philosophy best suited to fulfilling an organization’s strategic vision and mission.

Stepputat (1995)

Arlene Stepputat identified ten overarching categories that are necessary for successful volunteer resource management:

1. Recruitment
2. Application, interview, and screening
3. Orientation and training
4. Placement
5. Supervision and evaluation
6. Recognition  
7. Retention  
8. Record keeping  
9. Evaluation  
10. Advocacy and education

Like other authors, Stepputat believed that the role of volunteer manager is unlike any other professional position in an organization and is not clearly understood by many, even those in the nonprofit sector.

Educating and preparing professional volunteer managers is an important component of the Stepputat model, recognizing the need to engage with other paid staff and support their work with volunteers. Additionally, policy development and implementation are key components to the volunteer manager’s roles and responsibilities, emphasizing that volunteers are an additional human resource and that the interaction between all other departments/units of the organization will increase the likelihood of success.

A primary role of the volunteer manager, according to Stepputat, is that of advocating for volunteers and volunteerism within the organization and the community. This advocacy is more than simply communicating the importance of volunteerism; rather it also includes taking specific steps to make sure that volunteers are engaged in special programs, training, or recognition events. Additionally, advocacy strategies should extend to understanding state and federal legislation that may affect volunteer engagement and organizational policy development that has implications on volunteer engagement.

Ellis (1996)

Susan Ellis placed a significant emphasis on the executive leaders of an organization and their involvement as necessary for successful volunteer programs, beyond engaging just when something went wrong. Recognizing that the nonsalaried personnel department of an agency is the volunteer program, Ellis argued that it deserved as much attention as the salaried personnel department. Before engaging volunteers, Ellis suggested that organizations must develop a statement of philosophy, goals and objectives, policies, management structure, organizational chart, and what they want to communicate about the organization. Having each of these components in place prior to engaging volunteers results in an organization that is prepared for volunteers, thus significantly increasing the likelihood of success.

Ellis suggested that organizational leaders must allocate adequate resources, since volunteer engagement is not free. Consideration must be given to space and facilities, furniture and equipment, telephone, supplies, travel, postage, insurance, recognition, evaluation, and training/orientation. Another significant expense is the personnel assigned to direct the volunteer program, regardless of the percentage of time that the individual focuses on volunteer management. In addition to many of the expenses just identified, there also are expenses associated with the professional development of paid staff and engagement of advisory and support committees.

Building on the planning and staffing functions that Ellis identified, organizations must prepare for and manage volunteer and employee relationships.
Organizational leaders must plan for those employees who refuse to accept volunteers, perceived threats from paid staff, tension between volunteers and staff, and volunteer resistance. Many, if not all, of these challenges can be overcome with proper planning and education of current paid staff prior to engaging volunteers. Strategies are offered, including incorporating language that emphasizes working with volunteers in paid staff position descriptions, training for paid and volunteer staff, and a clear delineation of roles and responsibilities. Organizational leaders must be cognizant of legal issues associated with issues of confidentiality, employer/employee relationships, liability and injuries, car insurance, board member indemnification, and conflict and dispute resolution. Program leaders must determine not only what to assess but also how to carry this assessment in an ongoing manner. Likewise, organizations should be cautious not to try to compare the accomplishments of volunteers to paid staff since this may cause more challenges; however, it is important to evaluate the service of individual volunteers and the performance of paid staff directly involved in the volunteer program or who are supervising volunteers. Finally, Ellis provided justification for why it is important to calculate the true costs of the volunteer program, including the donated time of volunteers, and supplied work sheets to calculate these into organizational budgets.

Culp, Deppe, Castillo, and Wells (1998)

The generate, educate, mobilize, and sustain (GEMS) model of volunteer administration built on the models already described as well as the Volunteer Management Cycle proposed by Lawson and Lawson (1987) and the Volunteer Professional Model for Human Services Agencies and Counselors developed by Lenihan and Jackson (1984). Lawson and Lawson focused their work on the religious community and included many of the same components as previously described. Lenihan and Jackson focused their work on community agencies and professional counselors with their model “designed specifically for those who are encouraged by their employer or company to serve in volunteer roles with human service agencies” (p. 37).

The GEMS model consists of four distinct concepts of generating, educating, mobilizing, and sustaining volunteer efforts. Generating includes six phases: conducting a needs assessment, writing position descriptions, and identifying, recruiting, screening, and selecting volunteers. Educating includes the four components of orientating, protecting, resourcing, and teaching. It is worth noting that the “protecting” terminology is unique and includes how an organization addresses risk management broadly, including conflict resolution and appropriate behaviors. The resourcing phase continues the more recent acknowledgment that volunteer management is not free and that there are real and direct costs associated with engaging volunteers.

The mobilizing phase of the GEMS model of volunteer administration includes engaging, motivating, and supervising volunteers. Ken Culp and his coauthors built on and incorporated motivation theory highlighted by Wilson (1976). Finally, the model concludes with the sustaining component that included evaluation, recognition, retention, redirection, and disengagement. Following a more contemporary acknowledgment of the similarities between paid and volunteer staff, the GEMS model recognizes that organizations sometimes have to be orientated again if they are implementing a new volunteer position or receiving a less than desirable
evaluation. Additionally, the model recognizes the need to disengage volunteers, either through their own decision or the decision of the organizational leaders. An important component of the GEMS model is that volunteers may enter the model at whatever phase is necessary or that the volunteer resource manager can determine that individuals need to reenter a component at a given time; in other words, the model is not linear.

Comparing the Models: Similarities and Differences

Exhibit 1.1 depicts the volunteer management models discussed in this chapter. In-depth and thorough reviews of each of the previously identified works revealed respective both similarities and disparities among the authors’ ideas regarding volunteer management competencies, as well as similar findings and/or suggestions concerning the needed competencies for managers of volunteer programs to be successful (Safrit & Schmiesing, 2004, 2005). Many, if not all, volunteer management models have built on the early work of Boyce (1971) and include in some format the seven components of leadership development that he adopted from the field of adult learning and applied to volunteer management.

It could be argued that, to a degree, all of the models discussed are basically the same, with the only differences being the words used to describe a specific component or that some components are embedded within others and thus not easily identifiable. The authors discussed recognize that volunteer management approaches have to expand beyond a focus on the individual volunteer to address organizational systems as well. Developing a volunteer management model based on best practices, Wilson (1976) focused on the critical practical roles of salaried managers or volunteers, including motivating volunteers; establishing a positive organizational climate for volunteer involvement; planning and evaluating volunteer programs; developing volunteer job descriptions; recruiting, interviewing, and placing volunteers; and effective communications. Another pragmatic approach was proposed by MacKenzie and Moore (1993), who identified fundamental management principles and practices formatted into worksheets to assist the day-to-day manager of volunteers. Ellis (1996) identified components of volunteer management by proposing professional, administrative approaches to volunteer management. Navarre (1989) approached volunteer management from a staff management focus in grassroots volunteer organizations. Navarre’s focus included the importance of having written job descriptions; recruiting, interviewing, orienting, and training new volunteers; and volunteer supervision, evaluation, and motivation. Approaching volunteer management in a very similar manner, Stepputat (1995) identified ten overarching categories that were necessary for successful volunteer management, including recruitment; screening; orientation and training; placement; supervision and evaluation; recognition; retention; record keeping; evaluation; and advocacy and education. Finally, Brudney (1990) identified practical components for public agencies to implement in order to mobilize volunteers for public service in communities.

From a purely conceptual approach, several authors developed volunteer management models within the context of the United States Cooperative Extension System. Kwarteng et al. (1988) identified eight conceptual components to volunteer administration: planning volunteer programs; clarifying volunteer tasks; and the
EXHIBIT 1.1  Historical Development of Volunteer Resource Management Components

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Importance of volunteer management</td>
<td>Professionalism</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inventory of jobs</td>
<td>Identification</td>
<td>Selection</td>
<td>Job descriptions</td>
<td>Recruiting Screening</td>
<td>Designing and organizing programs</td>
<td>Locating</td>
<td>Developing volunteer roles</td>
<td>Establishment of organizational climate Recruiting</td>
</tr>
<tr>
<td>Inventory of volunteers</td>
<td>Recruiting</td>
<td>Screeners</td>
<td>Volunteer motivation recruitment interviewing and placement</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Planning Staffing</td>
</tr>
<tr>
<td>Recruitment</td>
<td>Selection</td>
<td>Placement</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Generating</td>
</tr>
<tr>
<td>Recognition</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervision</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Utilization</td>
<td>Planning Communications</td>
<td>Supervising</td>
<td>Planning and managing volunteer programs</td>
<td>Operating</td>
<td>Supervising</td>
<td>Volunteer/employee relationships Teamwork Legal issues</td>
<td></td>
<td>Mobilizing</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provision for mobility</td>
<td>Evaluation</td>
<td>Evaluating</td>
<td>Evaluating</td>
<td>Improving service quality and impact Encouraging volunteer involvement</td>
<td>Perpetuating</td>
<td>Evaluating</td>
<td>Evaluation of impact Dollar value of volunteers</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*Source: Based on Safrit, Schmiesing, Gliem, and Gliem (2005).*
recruitment, orientation, training, support/maintenance, recognition, and evaluation of actual volunteers. Penrod’s (1991) L-O-O-P model suggested these conceptual components of volunteer management: locating and orientating volunteers, operating volunteer programs, and perpetuating volunteer involvement. Most recently, Culp et al.’s (1998) GEMS model built on and reorganized the earlier works of Penrod and of Kwarteng et al. by organizing components of volunteer administration into four overarching categories: generating, educating, mobilizing, and sustaining volunteers.

Empirically Based Model of Volunteer Resource Management: PEP Model of Volunteer Administration

Prior to 2004, little to no empirical research existed that quantitatively investigated and identified the core competencies needed for managers of volunteers to effectively administer volunteer-based programs and the individuals who serve therein. Safrit and Schmiesing (2004) conducted research to identify the competencies needed based on historical literature and contemporary practices of volunteer administrators, resulting in the PEP model (Safrit, Schmiesing, Gliem, & Gliem, 2005). The purpose of their exploratory study was to identify components of volunteer management based on both published literature and contemporary best practices. The researchers developed a qualitative methodology utilizing both deductive content analysis and inductive thematic development (Thomas, 2003). According to Miles and Huberman (1994), “Qualitative researchers usually work with small [authors’ italics] samples of people, nested in their context and studied in-depth” (p. 27). Kuzel (1992) and Morse (1989) suggested that qualitative samples tend to be purposive (i.e., seeking out specific individuals or types of individuals due to their direct connection or expertise with the focus of the research) rather than random as in broader, quantitative research. Consequently, the researchers utilized practitioner and action research concepts suggested by Jarvis (1999) as well as documented histories of national consulting, program management, and professional leadership in volunteer administration to identify eight current volunteer managers (“practitioners”) and 11 current national/international consultants (“experts”) to participate in the study. Seven individuals from each group agreed to participate.

The researchers asked the seven practitioners to reflect on their day-to-day successful practices in managing volunteers and, based on their reflections and real-life contemporary experiences, to identify effective components of contemporary volunteer management. Similarly, the researchers asked these experts to read two or three entire documents of published literature on volunteer management, to reflect on their readings, and (based on their reflections and the literature read) also to identify effective components. The researchers developed a theme identification work sheet to facilitate participants’ reflections in identifying components of volunteer management and submitting them to the researchers in short words and phrases.

The researchers analyzed the data initially by using constant comparative analysis (Glaser & Strauss, 1967). They read and reviewed the volunteer management components identified by both the practitioners and experts and collapsed the initial data into recurring themes using a modified storyboarding technique (Tesch, 1990).
The researchers employed triangulation (Cohen & Mannion, 1985) with two separate groups of volunteer administrators and one group of Ohio State University faculty familiar with volunteerism and qualitative research, in order to strengthen the integrity of the collapsed themes identified, resulting in valid volunteer management components and subcomponents. Based on the data from consultants and practitioners, three categories and nine constructs were identified and included that comprised the conceptual PEP model:

Category I: Personal Preparation
1. Personal and Professional Development
2. Serving as an Internal Consultant
3. Program Planning

Category II: Volunteer Engagement
4. Recruitment
5. Selection
6. Orientation and Training
7. Coaching and Supervision

Category III: Program Perpetuation
8. Recognition
9. Program Evaluation, Impact, and Accountability

Subsequently, the researchers used the PEP conceptual model to ask members of the Association of Volunteer Administration about their perceptions of the importance of each potential competency suggested in the PEP conceptual model (Safrit et al., 2005). The population for the subsequent study was the 2,057 individual members of the Association for Volunteer Administration (AVA) as of July 1, 2004, and included 1,889 AVA members from the United States, 98 from Canada, and 70 from other countries. The researchers used a quantitative methodology approach of a mailed questionnaire consisting of 140 individual volunteer management competencies based on the prior qualitative study. A pilot test provided Cronbach's alpha reliabilities for individual constructs that ranged from .73 to .93. Since all values were greater than .70, the researchers determined the questionnaire to be reliable (Stevens, 1992).

The authors achieved a final response rate of 25% (Wiseman, 2003) and followed up with 150 randomly selected nonrespondents (Linder & Wingenbach, 2002; Miller & Smith, 1983); they found no significant differences between respondents and nonrespondents. To determine if the data were appropriate for factor analysis using the principal component analysis technique, a correlation matrix of volunteer management competencies was reviewed for intercorrelations greater than |0.30|, and two statistics were computed. Based on the correlation matrix and the statistics calculated, the researchers concluded that the data were appropriate for component analysis.

Two criteria were used initially to determine the number of components to be extracted. First, only components with eigenvalues greater than 1.0 were considered for the analysis. Second, a scree plot of the component eigenvalues was used to identify breaks or discontinuity in determining the number of major components. After initial extraction, a third criterion for the determination of the number of components to extract was whether they possessed meaningful interpretation (simple structure and conceptual sense). The extraction procedure resulted in the identification of
seven components underlying the conceptual constructs of volunteer management competencies. The components were rotated using a varimax rotation method with Kaiser normalization to aid in interpretation. A maximum likelihood factor extraction procedure was also used to observe the stability of the components identified in the principal component analysis. This second technique resulted in the delineation of identical factors with similar loadings as the principal component analysis, reflecting stability in the results.

The component loadings in the rotated component matrix were examined to understand and interpret the nature of the seven components. To assist in the interpretation and reduce subjectivity and the likelihood of non-significant items loading on the components, only items with component loadings of \(|0.40|\) and higher were considered for naming the seven components (Stevens, 1992). The researchers utilized a qualitative triangulation methodology (Cohen & Mannion, 1985) with themselves and three nationally recognized experts in volunteer management and administration to name the components identified.

The end result was an empirically based model for volunteer management, the first of its kind (as far as the authors can ascertain). Still referred to as PEP, the revised model includes seven components of contemporary volunteer management and administration, with each component reflecting respective requisite professional competencies (see Exhibit 1.2). Together, the seven components accounted for 39.2% of the total variance among the empirical data collected.

The seven components identified in PEP emphasize practically all of the volunteer management competencies identified during the previous 35 years by authors and professional leaders in the field. The four components of volunteer recruitment and selection, volunteer orientation and training, volunteer program maintenance, and volunteer recognition address the large majority of volunteer management concepts that have been identified traditionally for volunteer organizations and programs holistically (Boyce, 1971; Brudney, 1990; Culp et al., 1998; Ellis, 1996; Fisher & Cole, 1993; Navarre, 1989; Penrod, 1991; Stepputat, 1995; Wilson, 1976).

Comparing PEP to Historical Models

As shown in Exhibit 1.3, previous models of volunteer management have not adequately addressed the personal and professional growth of the individual volunteer manager (with the possible exception of Fisher and Cole, 1993, and Brudney, 1990, to some degree). This analysis is supported by the Points of Light Foundation (Allen, 1995):

> [As we have discussed before [regarding volunteer management], volunteer coordinators were, in a way, a missing element. This is not to say that volunteer coordinators are not important—indeed, in an earlier piece we argued that the research leads to a more important role of internal consultant and change agent for volunteer coordinators. Rather, it underscores that it is not the mere presence or absence of a staff position with that title that makes the difference. It is the way the person in the position thinks, what he or she does and what the system is prepared to allow him or her to do—those are the critical differences between the “more effective” and “less effective” organizations. (p. 17)
### EXHIBIT 1.2 PEP (Preparation, Engagement, and Perpetuation) Model for Contemporary Volunteer Management and Administration

<table>
<thead>
<tr>
<th>Professional Domain</th>
<th>Domain Topic Area(s)</th>
<th>Domain Topic Area Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Personal)</td>
<td>Preparation</td>
<td>Professional development</td>
</tr>
<tr>
<td></td>
<td>Volunteer recruitment and selection</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Volunteer orientation and training</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Volunteer recognition</td>
<td></td>
</tr>
</tbody>
</table>

(continued)
### EXHIBIT 1.2 (Continued)

<table>
<thead>
<tr>
<th>Professional Domain</th>
<th>Domain Topic Area(s)</th>
<th>Domain Topic Area Competencies</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Program maintenance</td>
<td>Resolve conflicts between volunteers and paid staff; support paid staff when working with volunteers; train and educate current staff to work with volunteers; educate new paid staff on volunteer management; recognize paid staff for participating and supporting the volunteer program; involve paid staff in the recognition of volunteers</td>
</tr>
<tr>
<td></td>
<td>Resource development</td>
<td>Identify fundraising needs; develop fundraising plans; solicit funds from prospective supporters; build positive relationships with donors; research market for potential volunteers; establish marketing plan and tools for volunteer recruitment; utilize a variety of media to recruit volunteers; implement ongoing recruitment plan</td>
</tr>
<tr>
<td></td>
<td>Program advocacy</td>
<td>Identify a leadership team for the volunteer program; conduct focus groups to identify program needs; represent volunteer interest in program development; promote and provide additional leadership opportunities to potential volunteers; engage volunteers to teach components of the orientation and training process; develop ongoing training needs assessment for paid staff; train staff to select volunteers using acceptable procedures; identify future uses of volunteer program evaluation results; conduct performance evaluation for those assigned to supervise volunteers; develop ongoing training needs assessment for volunteers; educate others on how to evaluate components of the volunteer program; share progress toward goals with current volunteers</td>
</tr>
</tbody>
</table>

*Source: Safrit, Schmiesing, Gliem, and Gliem (2005).*
EXHIBIT 13  Comparison of Volunteer Resource Management Components Identified in the Literature with the PEP Model

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Professional</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>development</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Volunteer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>recruitment and</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>selection</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inventory of jobs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inventory of</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>volunteers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruitment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selection</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identification</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selection</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professional</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>development</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Volunteer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>recruitment and</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>selection</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inventory of jobs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Inventory of</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>volunteers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruitment</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selection</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Identification</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Selection</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Volunteer job</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>descriptions</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruiting</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Screening</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Designing and</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>organizing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>programs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Attracting and</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>retaining</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>able volunteers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Locating</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Developing volunteer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>roles</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Establishing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>organizational</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>climate</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruiting</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training and</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>development</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal issues</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Educating</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Volunteer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>orientation and</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Induction</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Orientation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Orienting</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Orienting</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Training and</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>development</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal issues</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Educating</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Volunteer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>recognition</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recognition</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>maintenance</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervision</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Utilization</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Communications</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervising</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning and</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>managing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>volunteer programs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Operating</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervising</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Volunteer/employee</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>relationships</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teamwork</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Legal issues</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mobilizing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resource</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>development</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evaluating</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>cost effectiveness</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Budgeting and</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>allocating</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>resources</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Program</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>advocacy</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Provision for</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>mobility</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evaluation</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evaluating</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evaluating</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Improving service</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>quality and impact</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Encouraging</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>volunteer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>involvement</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Perpetuating</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evaluating</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Evaluation of impact</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dollar value of</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>volunteers</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sustaining</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Based on Safrit, Schmiesing, Gliem, and Gliem (2005).
Two other differences that are worth additional discussion relate to program maintenance and resource development. Perhaps an argument of semantics, program maintenance was not previously included in the historical models. In the PEP model, program maintenance takes a holistic view of the functions related to supervision, performance evaluation, utilization, and overall engagement of the individual volunteer. The competency of resource development is certainly not new to the profession; however, the level of skill and experience needed to be successful likely has increased dramatically in recent years, which is why it has been identified in the research. Resource development goes beyond budgeting and determining the cost effectiveness of a volunteer program to include the overall development and implementation of a comprehensive and contemporary plan to secure resources for the program. The notion of resource development as a significant component of a volunteer manager's position description may be unsettling for some; however, without a comprehensive plan, the ability to support the program and the volunteers adequately is likely diminished significantly. A final component that has some differences from historical models is that of program advocacy that has become a very significant component of the volunteer manager's position. Taking the components of evaluation and sustaining that previous authors identified in their models, the PEP model suggests that one must operationalize those activities so that the volunteer program may grow and be sustainable in local communities.

While there are notable differences between the PEP model and the historical models and concepts previously discussed, there are also similarities. Like most, if not all, models before PEP, the components originally identified by Boyce (1971) are included in this model as well. This notion further validates the importance of those competencies and how they are applicable even in today's complex and often fast-paced environment of engaging volunteers through many different modalities (i.e., short term, long term, episodic, virtual, etc.).

Comparing PEP to Contemporary Models

The Council for Certification of Volunteer Administration (CCVA) is responsible for awarding the credential Certified in Volunteer Administration (CVA) and promoting six core values in volunteer resource management. The CCVA (2008) outlines five core competencies:

1. **Ethics.** Acting in the accordance with professional principles
2. **Organizational management.** Designing and implementing policies, processes, and structures to align volunteer involvement with organizational mission and vision
3. **Human resource management.** Successfully engaging, training, and supporting volunteers systematically and intentionally
4. **Accountability.** Collecting relevant data and meaningfully monitoring, evaluating, and reporting
5. **Leadership and advocacy.** Advancing and advocating individual, organizational, and community goals and volunteer involvement, internally and community-wide
To support the credentialing process and to provide a comprehensive resource, the CCVA uses the book *Volunteer Administration: Professional Practice* (Seel, 2010). The chapters in the book align well with the PEP model of volunteer resource management and focus on:

- Terminology
- Ethics and ethical decision making
- Strategic management
- Operational management
- Staffing and development
- Sustainability
- Meeting management
- Financial management
- Data management
- Evaluation and outcome measurement
- Risk management
- Quality improvement
- Leadership
- Organizational involvement
- Advocacy
- Collaboration and alliances
- Historical perspectives of volunteer management

Exhibit 1.4 includes the competencies identified by CCVA as it compares to PEP and the historical models discussed previously.

**Conclusion: Volunteer Resource Management Today and in the Future**

Exhibit 1.4 depicts all models of volunteer management that have been discussed in this chapter and compares the PEP model to the CCVA core competencies. There are significant similarities between the two with minor differences noted. Ethics, accountability, and leadership and advocacy from the CCVA core competencies align with the PEP competencies of serving as an internal consultant, personal and professional development, and program evaluation, impact, and accountability. The CCVA core competency of organizational management aligns with PEP program planning. Human resource management, from the CCVA model, aligns with the recruitment, selection, orientation, recognition, training, and coaching and supervision competencies from the PEP model. Differences between the two competency models lie primarily in semantics as both models include the contemporary competencies for an individual to be successful as a volunteer manager.

Research in the field of volunteer resource management continues to expand, specifically related to the required competencies, identification of effective components, and/or level of competence with selected volunteer resource management competencies. Barnes and Sharpe (2009), through a case study, investigated alternatives to traditional volunteer resource management models that would promote lifestyle integration, organizational informality and flexibility, and volunteer-agency
EXHIBIT 1.4 Comparison of Volunteer Resource Management Components Identified in the Literature with the CCVA and the PEP Models

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Ethics</td>
<td>Professional</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>development</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Human</td>
<td>Volunteer</td>
<td>Inventory of</td>
<td>Identification</td>
<td>Establishing</td>
<td>Volunteer</td>
<td>Designing</td>
<td>Locating</td>
<td>Developing志愿 roles</td>
<td>Planning</td>
<td>Generating</td>
</tr>
<tr>
<td>Resource</td>
<td>recruitment and</td>
<td>jobs</td>
<td>Selection</td>
<td>positive</td>
<td>job descriptions</td>
<td>and organizing</td>
<td>and retaining</td>
<td>volunteer roles</td>
<td>Staffing</td>
<td></td>
</tr>
<tr>
<td>Management</td>
<td>and selection</td>
<td>Inventory of</td>
<td></td>
<td>organizational</td>
<td></td>
<td>programs</td>
<td>and retaining</td>
<td>able volunteers</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>volunteers</td>
<td></td>
<td>climate</td>
<td>Volunteer job</td>
<td>Recruiting</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Recruitment</td>
<td></td>
<td></td>
<td>descriptions</td>
<td>Screening</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Selection</td>
<td></td>
<td>Volunteer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Placement</td>
<td></td>
<td>motivation,</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>recruitment,</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>interviewing,</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>and placement</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Volunteer</td>
<td>Induction</td>
<td>Orientation</td>
<td>Orientation</td>
<td>Volunteer</td>
<td>Planning</td>
<td>Operating</td>
<td>Supervising</td>
<td>Volunteer/employee</td>
<td>Budgeting and</td>
<td>Mobilizing</td>
</tr>
<tr>
<td>orientation and training</td>
<td>Training</td>
<td>Training</td>
<td>job descriptions</td>
<td>and managing</td>
<td>volunteer programs</td>
<td></td>
<td>Supervising</td>
<td>relationships</td>
<td>allocating resources</td>
<td></td>
</tr>
<tr>
<td>recognition</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organizational</td>
<td>Program</td>
<td>Supervision</td>
<td>Utilization</td>
<td>Planning and</td>
<td>Operating</td>
<td>Supervising</td>
<td>Operating</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Management</td>
<td>maintenance</td>
<td></td>
<td>Communications</td>
<td>managing</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>volunteer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>programs</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accountability</td>
<td>Resource</td>
<td>Evaluation</td>
<td>Evaluating</td>
<td>Evaluating</td>
<td>Improving service</td>
<td>Evaluating</td>
<td>Perpetuating</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>development</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>quality and impact</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Encouraging volunteer involvement</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Leadership and Advocacy</td>
<td>Program</td>
<td>Evaluation</td>
<td>Evaluating</td>
<td>Evaluating</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advocacy</td>
<td>advocacy</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Provision for mobility</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: Based on Safrit, Schmiesing, Gliem, and Gliem (2005).
collaboration. Hager and Brudney (2004) investigated the adoption of nine practices for volunteer management by charities and congregations. Boyd (2004) conducted a Delphi study to identify those competency areas that would require managers of volunteers to be proficient in the future. Harshfield (1995) investigated the perceived importance of selected volunteer management components in western U.S. schools, while King and Safrit (1998) did likewise for Ohio 4-H Youth Development agents. These research examples demonstrate the significant interest in the field of volunteer management and the need to continue to conduct research to determine best and effective practices that will allow the profession to continue to evolve.

As previously discussed, the literature identified competencies that are certainly consistent across all contexts; however, as volunteerism continues to evolve, it is imperative that the competencies be considered in the right context. It must be recognized that competencies alone do not define the profession or prepare the individual who will be working in the profession. New professionals, and arguably seasoned professionals as well, need to have a chance to practice what is taught in the formal setting, through internships, practicums, and other similar arrangements. Additionally, as new competencies are identified and the field of volunteer management continues to evolve, it is imperative that degree and certificate programs adapt and include in their curriculum the new competencies for the profession to remain relevant and the individuals prepared to enter the workforce.

References


References


Volunteer Demographics

Harriett C. Edwards, EdD
R. Dale Safrit, EdD
Kimberly Allen, PhD
North Carolina State University

This chapter explores the concept of volunteer demographics from three perspectives. First it describes volunteer demographics in the United States for 2010 as well as selected demographic trends since 1974. Then the chapter approaches volunteer demographics from the perspective of human development across the life span, with accompanying critical implications for volunteerism and volunteer resource management based on specific periods of human development. Finally, the chapter discusses volunteer demographics based on the contemporary theory of generational cohorts, again with accompanying critical implications for volunteerism and volunteer resource management based on specific generational cohorts.

Volunteer Demographics: Considering Both the Forest and the Trees

According to the Merriam-Webster dictionary (2010), the noun “demographics” is defined as “(plural): the statistical characteristics of human populations (as age or income) used especially to identify markets; a market or segment of the population identified by demographics.” Thus, demographics describe a targeted population or subpopulation based on specific social or cultural characteristics, and are especially powerful in helping to market programs and services to that population or subpopulation. Thus, the term “volunteer demographics” refers to the use of identifiable social, cultural, or personal characteristics or traits to better understand volunteers as an overall, holistic targeted subpopulation of larger society. Such demographics are very useful to volunteer resource managers in targeting specific societal populations.

This chapter is based on an earlier work coauthored by R. Dale Safrit in 2001 with Scott D. Scheer and Jeffrey E. King of The Ohio State University. Certain sections have been duplicated verbatim with written permission of The International Journal of Volunteer Administration.
and subpopulations for purposes of recruiting new volunteers, better understanding current volunteers’ potential motivations for volunteering, and understanding potential barriers to individuals who may consider volunteering. Examples of typical demographics that can be used for such purposes include age, gender, race/ethnicity, marital status, familial makeup, employment status, highest level of education achieved, total household income, and others.

Ideally, a volunteer resource manager should consider each potential or current volunteer as the unique individual he or she is and identify specific volunteer opportunities and requisite training needs based on that individualization. In reality, however, this ideal approach is often not feasible or practical due to several factors, including (but not limited to) the large numbers of volunteers being supported and other demands on the volunteer resource manager’s time. In this chapter, we focus first on selected volunteer demographics as of 2010 in the United States and some identified trends since 1974, based on empirical data collected by government sources. Then we discuss implications for recruiting new volunteers and better supporting current ones from two holistic conceptual approaches, both of which build on combinations of the specific types of demographics described earlier: volunteerism in the context of human development and in the context of generational cohorts.

Snapshot of Selected Volunteer Demographics in the United States

Discussing volunteer demographics over any extended period of time (i.e., multiple years) is somewhat of a challenge, largely due to the absence of consistent data collection by an ongoing research/demographics agency using consistent methodologies (e.g., asking the same questions year after year in the same manner). However, some national agencies have attempted to do so, using valid and reliable data analysis and extrapolation techniques to allow for such longitudinal perspectives.

In 2006, the Corporation for National and Community Service compared selected volunteer demographics between 1975 and 2005 using data collected by the U.S. Census Bureau using the Current Population Survey (CPS). The CPS used a consistent definition of “adult volunteer” as “someone age 16 and older who did work through an organization in the previous 12 months for which they were not paid” (p. 4). Thus, the CPS collected data only regarding formal volunteerism (i.e., volunteerism conducted under the auspices of a formal organization or agency) as compared to informal volunteerism (i.e., volunteerism performed by an individual without any connections to a formal organization or agency). The 2005 statistics utilized came from a pooled CPS data set that combined responses from the 2003, 2004, and 2005 surveys; consequently, data were modified so as to calculate the 2005 volunteer rate compared to those from previous reports.

Still, several interesting trends were identified based on the demographic comparisons from 1974 to 2005:

- Volunteering rates for individuals ages 16 to 19 doubled between 1989 and 2005 to a rate that exceeded the 2005 national volunteer rate. The report authors attributed this enormous growth in volunteerism among teenagers to the growth of school-based service and service-learning programs and to young people’s
reactions to the events of September 11, 2001, in expressing an increased desire to serve their community.

- There was a 30% increase in the rate of volunteering among midlife adults ages 45 to 64. Suggested reasons for this increase included higher levels of educational attainment and delays in marriage and childrearing.
- The largest increase observed among a specific demographic group during this 30-year period was a 64% increase among Americans age 65 and over. Furthermore, the percentage of these older volunteers contributing 100 or more hours increased by 46%. These surprising statistics were attributed to generational attributes (to be discussed later in this chapter), connections between improved health and volunteerism, and improved education and disposable income levels.

In 2010, the Corporation for National and Community Service once again compiled a snapshot of volunteerism in the United States based on selected demographics. Of course, between the years of 2005 and 2010, the United States experienced a major economic crisis that had resulted in increased needs and demands for government and public sector programs, especially for more vulnerable populations. However, in response to this crisis, the Corporation concluded that during the previous year, 63.4 million Americans had volunteered in their communities (an additional 1.6 million compared to 2008), providing 8.1 billion hours of service with an estimated value of $169 billion. This was the largest single-year increase in the number of volunteers and the volunteer rate since 2003. The increase was largely driven by increased volunteer rates among women (especially ages 45 to 54), married individuals (especially married women), and employed individuals (especially those employed full time). The highest volunteer rates were observed among individuals with children under the age of 18 living at home and individuals with a high school diploma or college degree.

Of course, entire tomes could be written regarding demographic trends in volunteerism. This small section highlights just a few of the more interesting aspects of volunteerism observed among Americans during the past several decades. While such trend analysis is important to volunteer resource managers in placing a respective volunteer program into the larger social context, more important is the ability of a volunteer resource manager to understand specific opportunities and limitations for any individual to volunteer based on larger developmental and social characteristics. Therefore, the remainder of this chapter explores volunteerism based on two holistic premises: (1) stages of human development and (2) generational cohorts.

Volunteerism Across the Life Span: Understanding “Seasons of Service” in Human Development

Volunteering does not happen in a vacuum (Ellis, 2010), and so it stands to reason that major life events and social phenomena that impact society in general will also have an impact on volunteer activity. Volunteers make up practically every “season” of the human life cycle, from childhood, to the teen years, through early and middle adulthood, and well into the senior years. Depending on what life cycle stage volunteer currently are experiencing, they will have unique personal needs and
developmental characteristics that must be recognized and respected in order to pro-
vide the most positive experience possible for both the individual volunteers and the
sponsoring organization.

Although holistic human development can be more easily explored and under-
stood by examining respective individual life “seasons,” the true nature of the human
life span and the interconnectedness of the respective seasons must be approached
not as separate, well-defined episodes but rather as an ongoing human drama
wherein one scene blends seamlessly into the following one and each act flows into
its successor. This is the paradox of exploring human development across the entire
life span; we may study it by dissecting it into its component stages, but we may truly
understand it only by combining the stages into the resulting whole. Fisher (1997)
commented insightfully on this paradox:

[T]he journey from early infancy to senescence is an unfolding of unifying matur-
ational and developmental processes. Viewed as a continuum, this journey
appears to be seamless, with one moment flowing into the next...For purposes of
a more focused study, the observational frame can be shifted, maturational levels
can be designated, and these levels can then be viewed individually as a series of
connected but somewhat discrete epochs—“the seasons of life.” (p. 173)

Historically, volunteer programs have been developed to address the needs of a
single, targeted audience or group. The American Red Cross, one of the most well-
known volunteer efforts to come out of the post-Civil war era (Ellis & Noyes, 1990),
initially addressed male soldiers’ convalescent needs in a society at war. 4-H Youth
Development was established originally in the first decades of the 20th century to ad-
dress the needs of school-age boys and girls in rural agricultural settings (Reck, 1951).
In 1974, the hospice movement was founded to provide caring support for terminally
ill patients and their families (Ellis & Noyes, 1990).

However, contemporary volunteer organizations most often find themselves
simultaneously addressing multiple needs of multiple client groups. This challenging
reality of today’s not-for-profit environment has encouraged (and even forced!) many
volunteer-based organizations to find unique ways to connect the various client
groups they serve so as to make best use of increasingly scarce material and human
resources. Programs such as the Retired Senior Volunteer Program, Foster Grandpar-
ents, and Adopt-a-Grandparent build on the unique skills and abilities of individuals at
specific stages of life and their interests to contribute time, energies, and talents to
others without concern for financial gain. Such intergenerational programs connect
individuals from distinctly unique life stages with each other in order to improve the
quality of life for those in need, those uniquely challenged, and society as a whole.
The resulting “seasons of service” also serve important functions in helping us better
understand, appreciate, and value individuals experiencing life stages different from
our own; an intergenerational program not only bridges a generation gap with mean-
ingful interactions but also teaches children some positive aspects of being old
(Chen, 1997).

Understanding human seasons of service and promoting volunteerism across the
entire life span enable volunteer programs to meet increasing needs of unique client
groups while optimizing existing material resources and capitalizing on a growing
human resource base: senior volunteers. As Stevens (1998) stated: “The human resource of senior volunteers is alive and well and growing...Supporting their efforts through research-based practice directions can further their well-being” (p. 36).

Much like the world of volunteerism, the field of human development organizes life stages, or seasons, to make meaning of growth patterns. The field recognizes that development has three domains or dimensions: physical, social/emotional, and cognitive (Berk, 2008) and that those domains are heavily influenced by many systems working together. Bronfenbrenner’s (1986) ecological theory of development postulates that all systems work in tandem in child and human development, so it is important to consider developmental stages and systems of influence when organizing volunteers. Having a foundational knowledge of the three domains of development in all life cycles can help volunteer resource managers know how to best engage volunteers. The three domains of development are intimately intertwined to make up the whole person, and all three areas must be considered to promote healthy development and successful volunteerism at each life stage. The physical domain addresses physical growth and maturation in childhood and subsequent changes throughout adulthood, including gains and losses of motor abilities over the life span. The social/emotional domain relates to emergent relationships with peers, adults, and family as well as one’s ability to have self-control and to cope with emotions. Last, the cognitive domain (thinking) involves changes in the mental processes involved in reasoning, perception, languages, learning, and thought.

Child and youth developmental stages have been well studied over the past century. Jean Piaget was one of the first theorists to highlight sequential developmental milestones of human growth and development (Berk, 2008). Piaget’s developmental stages have been tested over time, and his theory is still thought of as the quintessential life stage theory (Crain, 2011). Many other theorists have expanded the understanding of child and family development in the three domains. Gesell’s (1925) maturational theory helps us understand physical development; Erikson (1959), Ainsworth (1967), Bandura (1977), and Kohlberg (1981) contributed greatly to the social/emotional development. And, of course, Montessori (1954), Piaget and Inhelder (1969), and Vygotsky (1978) are the leading authorities on cognitive development.

Having an understanding of developmental stages is important for volunteer resource managers when determining the best fit for volunteers. Using human development terms, if there is a goodness of fit between the volunteer and the environment, there is a higher chance that the volunteer will do better and stay longer. If, for example, a 15 year-old youth comes to volunteer at a food bank, the volunteer resource manager could consider the physical abilities, social-emotional norms and the cognitive development of this volunteer before placing her in a specific position.

Life Stages

Exhibit 2.1 presents a summary of human developmental characteristics across the life span in the context of volunteer resource management. The next subsections describe in more detail specific life stages across the human development continuum with regard to unique attributes and characteristics related to physical, social-emotional, and cognitive development for that stage.