

Moving People to Action — Working with Volunteers

As human service budgets have felt the pain of slashed government funding and more competitive fundraising environments, non-profits and social service agencies are increasing their reliance on volunteers to advocate for and maintain vital services.

Finding, recruiting and moving volunteers to action is a unique skill that few inherently possess, but many organizations desire. While it is common to hear language such as ‘community mobilizing,’ ‘developing partnerships’ or ‘volunteer leaders,’ it is unusual to observe a successful volunteer lead movement.

Fortunately, world wide history is filled with lessons for community. Susan B. Anthony and Elizabeth Cady Stanton advocated for public education in the early 1900’s and were instrumental in gaining the right to vote for women. AARP organized seniors across the country to improve policies for our elders. Today, successful organizations such as Parent Teacher Organizations send hundreds of volunteers into our schools each day and the national child advocacy group, Stand for Children, is leading volunteers across the country successfully raising millions of dollars for children.

Our greatest lessons lie in the stories from history and in taking a close look at today’s most successful organizations. HBSAA has taken the close look at the above mentioned success stories and has condensed these lessons into the following four step system to motivate volunteers to long term result focused action:

The HBSAA Volunteer Action System:

- 1 – Clearly Defining the Goal
- 2 – Tapping the Motivations of Volunteers
- 3 – Mentoring and Coaching
- 4 – Efficiently Moving Toward an Outcome

Step 1: Clearly Define the Goal (Don’t waste their time)

In the last 13 years of working with social service organizations, I observed the primary challenges facing organizations – despite lack of funding – are vague and unclear goals that are impossible to measure.

Not only are granting agencies and donors demanding measurable goals and outcomes, but volunteers are lost without clarity on results. In social services, donors and volunteers need to know that the investment of their dollar and time will produce results. Results begin with clearly defined goals.

How to Define your Goals:

- Engage and Ask Stakeholders
- Clarify What, Who and When

Engage and Ask Stakeholders:

It is critical to engage multiple stakeholders while developing the goals. Stakeholders are the individuals who will be impacted, have a leadership role in the project, or are likely to provide support with money or time. Stakeholders may be your administrative leadership, board, coalition, lead donors, volunteers or recipients of the service.

The first step is to ask the stakeholders "What do we want?" "What is the desired end result and by when?" This may be done by meeting one on one, or by facilitating group meetings, board meetings or forums. I have found the most effective and efficient process is to first meet with key leaders, develop draft goals and propose those goals and ideas during group meetings. This process provides a framework for discussion while still obtaining the expertise and 'buy in' from all stakeholders.

Clarify What, Who & When:

A clear goal statement entails what you want, from whom and by when. For example, we want X from Y by Z.

Note the difference between the two goals:

"The reading program volunteers will read to students at Jefferson Elementary school this year."

"Every 1st and 2nd grade student will be read to by a volunteer once a week for 20 minutes at Jefferson Elementary school for the duration of the 2003 school year."

Clear goals generate enthusiasm and confidence that creates a fertile foundation for recruits to give of their time or money.

Step 2: Tapping the Motivations of Volunteers

All individuals have personal motivations for volunteering. Individuals usually have several motivations and they may vary upon a given time period, job or circumstance. Therefore, it is critical to build a relationship to identify the current and on-going motivations of potential and current volunteers. We use HBSAA's Steps to Success to uncover and align volunteer motivations.

HBSAA's Steps to Success:

- Know your Own Motivations
- Develop a Relationship of Trust
- Observe, Affirm and Ask
- Align Goals

Know Your Own Motivation's:

The first step to understanding the motivations of another individual is to understand your own. Have you ever stopped and taken a moment to ask yourself, "why am I here?" "What is unique about me that draws me to this line of work, to this organization, and drives me to continue?"

These seemingly simplistic questions are critical to understanding what draws people to their field of work, the organization and to you. The more we understand our own behavior, the better we can understand others.

Develop a Relationship of Trust:

In order to identify core motivations of volunteers, a relationship must be developed that nurtures and builds trust. To do so an individual needs to know that you care as a coordinator or leader and have the best interest of the individual at hand.

Relationship building is simply taking an interest in the personal and professional developments of the individual and having the courage to share about yourself. Asking individuals "how they are, how they are doing in their work, how their children are..." and being willing to take a moment to listen goes a long way in developing a sense that you care about their well being.

Observe, Affirm and Ask:

Once there is an established trust in communication between the coordinator and volunteer, affirm them again and 'ask.'

Affirm the individual for their generosity and that their contribution to the cause will make a difference. Ask the individual why they are motivated to volunteer in this way. Ask "why this, what is unique about them to choose this route, and what results would they like to achieve?"

A common error of coordinators is to assume that they know what individuals are motivated by or that the individual motivations are the same as their own. By observing, affirming and asking direct questions, we learn a tremendous amount that is resourceful in guiding people towards a common goal.

Align Goals - Match Volunteer and Organization Goals:

Teams and organizations move toward success best when all members have something at stake. While some volunteers may feel motivated to give their best effort for the good of the whole and the success of the organization, it is naive to think that this is a sustainable and primary motivation for everyone.

By following the previous three steps you understand your own motivation and of those around you. You are now in a position to access and maximize these resources in your organization by intersecting the individual's motivation with achieving the organization's goals. The culminating outcome of HBSAA's Steps to Success System is to directly associate the successful completion of the organization's goals with the individual's motivation.

Step 3: Coaching (Training is not enough)

Like employees, volunteers need coaching to maximize their effectiveness. A coach is an individual who has developed a relationship of trust, understands the volunteer's core motivation and provides regular affirmation and support towards reaching the end goal. In addition, the role of a coach is to assess needs and to provide support and resources that assist the volunteer achieve the agreed upon goal.

I've too often observed volunteers left on their own with a task or an area of responsibility without receiving an assessment of their skills. Just as employees in effective organizations require human resource assistance, volunteers need an engaged coach or mentor who is able to assess needs, provide resources and support the volunteer.

Recently when working on a children's coalition, multiple leaders volunteered and were assigned an area of responsibility. The responsibilities ranged from leading fundraising to organizing parents at every elementary school in town. The coalition set a deadline to raise \$3000 by a specific date in order to print flyers and lawn signs. The chair believed the assigned volunteer was fulfilling his areas of responsibility and raising funds. Once the deadline neared, however, the volunteer was short of the goal by \$2000.

After investigating what went wrong, the chair learned the volunteer needed access to a telephone center in the evenings and was having difficulty raising a team of volunteers to make the necessary calls. Had the volunteer been assigned a coach, they would have been able to prioritize the problem and the coach could have provided support by connecting the volunteer with other resources to help secure a phone center and volunteers to make calls. The success of the coalition hinged upon the capacity to raise funds by the established timeline and with effective coaching and support, not only is the team set up to reach the goals but the volunteer will experience success.

During my years of coaching, several participants gave feedback such as "it was difficult to keep going because I struggled to see the end result, but you helped me trust the process and, as I kept taking steps, I saw results." By providing coaching, volunteers are more likely to stick with it and continue their work with you on future projects.

Step 4 – Efficiently Moving Toward an Outcome

Movement towards the goal in a timely manner is the oil between the bearings that assures progress forward with all parts intact. Just as oil creates lubrication, movement creates enthusiasm and confidence. Below are a few tips to create and maintain momentum toward the outcome.

- Set Short-Term Achievable Goals
- Strongly Affirm Each Accomplishment
- Run Efficient Meetings

Set Short-Term Achievable Goals:

Moving forward is accomplished by establishing short-term achievable goals during the process. For example, during the children's coalition project, weekly goals were developed with specific outcomes. Here is a high level summary:

Week One:

Identify stakeholders

Invite key stakeholders to attend strategy meeting

Week Two:

Clarify goal with larger stakeholder team

Assign volunteer leadership roles

Week Three:

Develop fundraising team and clarify \$ goal.

Week Four:

Print literature and distribute to all elementary schools

Identifying, communicating and accomplishing these short term goals and affirming the results inspired the members which resulted in volunteers continuing to work with a high level of involvement.

Each goal was designed for completion within a one to three week timeframe. The goals built upon themselves and created a foundation of clearly articulated accomplishments that were leading to the overarching goal.

Strongly Affirm Each Accomplishment:

Affirmation appears obvious, but is often the most overlooked area in volunteer management. Even if you see clear gaps in the process that need to be addressed, ensure that you first find the positive actions that have already been contributed and highlight them clearly. Volunteers will then be in a position of confidence and ready to accept the needed direction.

Lead Efficient Meetings:

Running efficient meetings is a critical component to keeping volunteers engaged. To maintain respect of time for all individuals, running a meeting with a clear goal and agenda within a specified timeframe is the first step.

Prior to each meeting, establish what the outcome is for the meeting. What is the goal? Craft an agenda with topics that will achieve the goal. Identify the start and end time of the meeting and stick to it. This is essential. People are most likely to attend meetings knowing the start and end time will be honored. Finally, establish the amount of time for each agenda item and assign an individual to facilitate each agenda item.

Write the agenda in a visible location at the meeting so all participants are clear on the meeting expectations and end goal.

While clear goals and agendas are a critical component, meeting participants need to have a purpose for being there. A purpose may include assigning tasks to accomplish a goal, decision making or sharing wisdom and experience. When establishing your goal and agenda, assess the participants attending, elicit input during the meeting for participants to share their wisdom, ensure discussion time to reach an agreed upon decision and clearly write up the tasks people volunteer for with the agreed upon timeline.

Effectively recruiting and moving volunteers to action in your organizations will provide ongoing dividends for your important work. Energize your organization today by tapping into this wellspring of resources, you will.

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