
Management

Processes that Foster Volunteer Retention

This article is excerpted from the new book by Steve McCurley and Rick Lynch, Keeping Volunteers: A Guide to Retention, which will shortly be available for download from www.energizeinc.com.

Many years ago Jan Carlson, the head of Scandinavian Airlines, made an interesting observation about customer service. He noted that what was important in providing good service was not so much the absolute quality of the service as the perception that the customer had of the quality of the service. This subtle observation explains why sometimes you can be confident that you are doing a good job only to discover that those you are providing it for have quite a different impression.

In many ways, a volunteer is another “customer” of the charity. Much of what a volunteer “sees and feels” as they relate to the organization will be similar to their experiences with other types of customer relationships. McSweeney and Alexander (1996) comment *“The first step in attracting new volunteers, and hopefully keeping them, requires us to look at ourselves, our organisation and structure from the perspective of the new entrant. What impressions do we create by the environment in which we work? What sort of general images do we portray as an organisation? How do we measure up in terms of friendliness and welcoming newcomers?”*

Volunteering and Consumer Behavior

Charities that take volunteers for granted tend to overlook the fact that the volunteer is, in a sense, always judging their performance. When the performance reaches unacceptable levels, the volunteer, like any educated consumer, will go elsewhere. Keaveney, Saltzman and Sullivan (1991) describe this as follows:

“Like any other customer, volunteers ‘shop’ for high quality volunteer experiences. Contrary to beliefs commonly held by dedicated managers and paid staff, the benefits of volunteering are not supplied by only one ‘vendor’ (i.e., nonprofit organization).”

The extent of this “shopping behavior” is indicated in the results of a 2004 analysis of the VolunteerMatch online matching system (Peter B. Hart Associates, 2004), which in response to the question “How many volunteer opportunities do you generally respond to before finding the right place to volunteer?” found the following patterns:

- One – 21%
- Two or three – 48%
- Four to six – 21%
- Seven + - 10%

Most volunteer-involving organizations, alas, treat prospective volunteers as more of a mystery than a potential shopper. Ellis (2002) notes *“It’s amazing how many organizations totally undercut their recruitment efforts by ignoring what happens to prospects when they make the attempt to express interest in becoming a volunteer.”*

One way to avoid this problem is to conduct a periodic audit of your services from the perspective of the customer, “walking” through your system and looking at what you do and how you do it from the customer’s point of view. This is most easily done by examining what are called “Moments of Truth,” interactions with the customer that allow them to form an opinion, either good or bad, about the quality of the service being provided.

Looking at Volunteering from a Customer’s Perspective

Some of these critical impressions can be formed before

you are even aware of the customer's existence; others are formed during interactions with you or members of your agency's staff.

As a first example of this, Hobson and Malec (1999) conducted a test of the volunteer management processes of 500 charities affiliated with the United Way in a mid-western city of the United States. The test involved calling each charity in the guise of a prospective volunteer, with the intent of testing how whoever answered the phone dealt with the would-be volunteer.

Here are some of their findings:

- Only 49.3% of callers received an offer of assistance ("May I help you?")
- 69.3% did not receive the name of the staff person answering the phone
- 26.4% were not referred to the appropriate contact person
- When the contact person was not available, only 48.7% of callers were asked for their name and phone number
- Only 30% of callers received a return call after leaving their contact information
- In 16.1% of calls, prospective volunteers were not thanked for contacting the agency

Imagine the attitude created among prospective volunteers who receive this sort of treatment. They are most likely to form an opinion that the charity, even if it is advertising for volunteer assistance, is neither sincere nor competent. The inattentiveness and casual treatment clearly indicates to them that the charity is not likely to value them if they were in fact to begin volunteering. That the charity's personnel are overworked, under-staffed and thoroughly frazzled is simply irrelevant to the perception which is formed – the prospective volunteer doesn't "see" this.

And now imagine what kind of response you might get if you called your own organization posing as a potential volunteer...

Following a similar study of Big Brothers and Sisters in Canada, Northstar Research Partners (1999) recommended:

"These are barriers that occur after the individual has made
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the decision to volunteer, and something happens externally to prevent them from doing so. Some examples cited are:

- *feeling 'put on the spot'*
- *on first contact, too much information was required from the volunteer, none was given to the volunteer*
- *agency seemed to be looking for an 'ideal'*
- *feelings of inadequacy in terms of skill*

Volunteers making first contact require reassurance and information. This study revealed that some felt alienated and inadequate after speaking to the agency for the first time.

Both recruitment and retention could potentially be improved by addressing some of the individual barriers and institutional barriers."

A similar result was found by Phillips, Little and Goodine (2002) in a study of motivations of Canadian volunteers:

"There was a clear sense that rules and screening procedures have become more onerous in recent years. Although all indicated that they understood the reasons for, and value of, police checks and other screening procedures for volunteers with access to children, sometimes the tone (the sense of being guilty until proven innocent) and length of time (months to receive word on a police check) made these processes annoying."

Similar difficulties exist in other areas of management when volunteers are delayed in being matched with clients or with work. Fahey, Walker and Lennox (2003) note the difficulty among Volunteer Ambulance Officers in Tasmania in areas where the small number of new volunteers delayed training of new recruits for months. One volunteer who was interviewed commented *"it takes typically 8-12 months for a new recruit to become trained. Most of our volunteers are now 'observers'."*

Finn Paradis and Usui (1987) discovered that turnover increased among hospice volunteers as their interest in volunteering waned if they were not immediately placed into work assignments following training. The Institute for Volunteering Research in the UK found a similar result in 2003:

“Several respondents told us they had been discouraged from volunteering because organisations took so long to respond to an initial enquiry, process an application or place the respondent once they had been recruited. Without a prompt response, many potential volunteers may walk away: they may join another organisation, or worse, they may assume that they are not wanted as volunteers and never even try again.”

Problems arising from the volunteer involvement process are not just limited to new volunteers. Griffiths (2003) points to some interesting difficulties beginning to arise among Meals on Wheels volunteers in New South Wales. Recent changes in Meals on Wheels procedures have resulted in less time being available for each volunteer to deliver meals to those on their route. The results that Griffiths notes are:

“...many of the volunteers commented that recent changes to Meals on Wheels operations and increased workload has affected the quality of the relationships that volunteers develop with recipients. One change that many volunteers commented on was that volunteers were not able to spend more than a few minutes with each recipient.”

Besides reducing interpersonal contacts with clients, the change in procedures was also hampering the development of relationships among volunteers who delivered meals together, forcing them to rush through the route.

Situations such as these led Hobson, Heler and Milbourne to conclude in 2002 that *“Most organizations are not ‘volunteer-friendly’ and have tremendous room for improvement.”*

Analyzing Volunteer Management Processes

The points of contact at which the customer tends to form judgments about the quality of service are often referred to as “Moments of Truth.” What follows is an attempt to guide you through a self-reflective examination of your volunteer management system, viewing it through the eyes and experiences of the volunteer. We’ll divide the examination into four stages:

1. The prospective volunteer’s initial approach to the charity

2. The process of first interviewing and matching the volunteer with a position
3. The ongoing working relationship of a volunteer with the charity
4. The follow-up by the charity with volunteers who have completed their term of service

Are you work through the questions consider:

- What perception is likely to be formed by a volunteer during this interaction?
- What can be done to shift that perception in a more positive direction?

1. Initial Approach

This stage covers the first experiences of the prospective volunteer with the charity, sometimes before the charity is even aware of their interest.

Initial Awareness

- Does the potential volunteer have an impression of your organization and its operation before contact is made?
- Is this impression favorable, accurate and complete?
- What do others say about your organization?
- How does the potential volunteer learn enough about you to even know that you are a possible source of volunteer work?
- Is your descriptive material readily accessible?
- Are your organizational materials available in languages matching the make-up of your community?
- Are those pictured in your materials representative of the community in which your organization operates?
- Do materials outline what the volunteer can expect to receive and answer the initial questions that the volunteer is likely to have?
- Do materials give the potential volunteer a reason to choose your organization rather than another one?
- Are your descriptive materials so crowded with detail that no one would be inclined to read them at all?
- How does the image of volunteering with you

look to different cultures, age groups, and populations than the ones currently involved?

Approach to the Organization

- Is it easy for the potential volunteer to come to you?
- Are there multiple ways that a volunteer can access you – phone, personal visit, Website, etc?
- Are you located so that the volunteer can access you easily?
- Do you look approachable?
- Are there clear directions to guide volunteers to those who will begin to interact with them?
- Have you considered setting up off-site contact points that might be more accessible to potential volunteers - at shopping areas, libraries, schools or other places where people congregate?

First Contact

- Do all staff receive training on how to deal with a prospective volunteer?
- How are volunteers treated by the first person with whom they have contact?
- Does that person make them feel welcome?
- Can that person help them clarify their interest in volunteering?
- Does that person make them begin to understand the process through which they will become involved?
- Does that person verbally express interest and gratitude?
- Is there a set packet of introductory materials that can be sent to prospective volunteers to educate them about the charity?
- How long does it take to call back interested community members who have expressed an interest in volunteering?

2. Interviewing and Matching

This stage covers the discussion between the charity and the volunteer about volunteering – the application process, volunteer interview, and the decision about an appropriate volunteer position.

Internal Referral

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- Are potential volunteers efficiently referred to others for assistance, without giving them the impression that they are being shunted off on someone else?
- Are they guided, rather than abandoned?
- If multiple referrals are necessary to resolve volunteers' questions, is there a clear reason for this which is explained to them?
- If the volunteers are referred to others, are they offered the choice of having the staff person call them versus their having to call back to the charity?
- If the primary volunteer program contact is not available, how long is the delay before the potential volunteer is called back?

Initial Application

- How are potential volunteers initially treated by the person who will be responsible for working with them?
- Are prospective volunteers made to feel important and welcomed, or do they feel like they are imposing?
- Is care taken to understand the volunteer's needs and perspectives?
- Do volunteers feel like they are the ones whose needs are paramount and that the intent of the organization is to bend all resources to make them feel satisfied?
- Are attempts made to minimize paperwork which must be completed by the volunteer and to explain the purpose and need for all paperwork that remains?
- Is a prospective volunteer sent information about the organization and its work to consider before coming in to further discuss volunteering?

- Are forms available in alternate formats for those with reading impairments – such as Braille or enlargeable computer files? Are forms available in alternate languages?

Negotiation and Interviewing

- Is the initial volunteer interview conducted at a time and place convenient to the prospective volunteer?
- Is the location for the interview likely to put the prospective volunteer at ease? Is the interview conducted more as a friendly chat or an interrogation?
- During the negotiation process over the work to be performed, does the volunteer understand why the negotiation over time, screening requirements, etc. is taking place, and does the volunteer feel satisfied about the bargaining process and its outcomes?
- Are volunteers given options about their type of work and scheduling?
- Do volunteers feel that you are as interested in making this work for them as for you?
- If screening or placement procedures are lengthy does the volunteer receive periodic contact updates?
- Is the prospective volunteer involved in ways other than directly volunteering during this waiting period - shadowing, observing, etc.?

3. On-going Working Relationship

This stage concerns the on-going interaction of the volunteer with the charity.



Working Process

- Do volunteers understand the process through which the work will be rendered and their role in that process?
- Are the roles and responsibilities of others with whom the volunteer will be working clearly spelled out?
- Are volunteers allowed to voice their opinions about how the work should be performed?
- Are these opinions regularly solicited?
- Does the volunteer feel a partner in what is going on?
- Do we attempt to keep paperwork that must be completed by the volunteer at a minimum?
- Do procedures assist volunteers in developing relationships with other volunteers, clients and staff or deter them from doing so?

Updating

- Are efforts made to keep the volunteer informed about the progress of the charity?
- Are these efforts initiated by the organization or does the volunteer have to perform them?
- Is the volunteer kept apprised of developments which will impact their ability to work?
- Is the volunteer invited to meetings in which the conduct of the charity is discussed and at which decisions are made?
- Does the volunteer participate in making these decisions?
- If key aspects of the work assignment change, is the volunteer informed of the need for these changes?
- Does the volunteer participate in determining how their own role might change or develop over time?

Delivery of Product

- Are volunteers given feedback about the performance of their work on a regular basis?
- Is this feedback designed to allow the volunteer to perform the work more effectively?
- Does the volunteer receive supervisory time and attention?
- Are volunteers recognized for their contribution on both a formal and informal basis?
- Is this recognition given in a way that shows respect for the volunteer?
- Are volunteers asked to provide their own feedback

about the quality of the work being performed?

- Are volunteers empowered to add their own thoughts and input into the way work is done and the type of work they are assigned?

4. Follow-Up

This final stage concerns the relationship between the volunteer and the charity after the volunteer has completed their initial term of service, including after the volunteer has moved on.

Departure

- Do volunteers perceive that the organization has enjoyed their participation and would like the volunteer to continue the relationship?
- Are volunteers made to feel as though they may return to the organization, even if they are interested in changing their volunteer assignment?
- Are these options explained to volunteers far enough in advance for them to consider their interests?
- Is an exit interview conducted to determine why a volunteer wants to depart?

Follow-Up

- Are attempts made to pro-actively contact volunteers who have completed their commitment to update them about services that have been rendered?
- Is additional information which might be helpful routinely sent to potential repeat volunteers?
- Are they kept on newsletter lists?
- Are they invited to activities or volunteer recognition events?

Continuing Contacts

- How are volunteers greeted and treated if they approach the organization for a second service?
- Are they remembered, recognized, greeted as old friends, or do they start all over again?

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- Are records kept of volunteer service that will even identify who has volunteered before and indicate what they were involved in?
- Are records kept of those who previously received services or participated in the program as clients who might come back in latter years to “give back” as volunteers?

When performing this examination, do not be limited to the questions above. Your examination should essentially “track” a volunteer through all the processes they encounter as they work with your organization. Put yourself in the place of the volunteer, view what is happening from their perspective, and analyze how confusing or cumbersome the process may appear to them.

One of the best ways to undertake this analysis is to involve new volunteers, many of whom will have distinct memories of what they found unfamiliar or uncomfortable. While some of these items seem insignificant, each of them can create a barrier that leads to the loss of volunteers.

Performing this analysis can tell you a lot about why you may be “losing” volunteers, especially if you seem to have poor retention during the early stages of volunteer involvement.

The Team Approach to Analyzing Volunteer Systems

The tricky aspect of looking at internal process is that it is difficult for those who created the process to truly realize how it looks to others. Those on the inside are more likely to understand the intricacies of a process and more likely to believe it works, mostly because they produced it. In addition organizational processes tend to go through an interesting mutation over time. Processes are originally developed for efficiency and providing service. As time goes on, however, these processes tend to be “improved” by those who are administering them – and generally improved to meet internal needs (i.e., what works “best” for staff) rather than external ones (what would work best for clients and others).

Accordingly, it is wise to involve a team of people in analyzing processes. The team should optimally include:

- The Volunteer Program Manager

- An experienced volunteer
- A new volunteer
- Agency staff that work with volunteers

Ilisley (1990) comments on the utility of volunteers in this effort:

“Procedures that can benefit from volunteer input include volunteer selection, orientation, pre- and in-service training programs, task assignment, and meetings. Because volunteers are directly involved in all these procedures, they are uniquely qualified to know which ways of carrying out the procedures work and which do not.”

It is also very valuable to have input from total outsiders, especially if the organization is attempting to recruit from new populations. Representatives of these groups may very well notice aspects of your procedures that are absolutely invisible to those already involved with the program.

Explaining Internal Processes to Volunteers

Another key area in developing friendly processes is ensuring that volunteers receive a good explanation of what is being done and why it is being done, especially as this relates to them. Interviews of prospective volunteers are a good time to provide some of this explanation, and in particular to explain to the volunteer what steps will need to be taken from the time of the interview until their official placement as a volunteer, and an approximate timeframe for these steps.

As screening processes for potential volunteers have become more common, more onerous and more time-consuming we have created a necessary but



unfortunate bottleneck between the desire of the motivated prospective volunteer to begin work and our risk management procedures. This bottleneck can lead to unfortunate results if volunteers are not aware of it and begin to suspect that they have been abandoned by the charity.

Here is an example of such an explanation, in this case utilized by the Girl Guides of Canada, where a complete screening process may take up to six months:

Tell the potential applicant:

- The steps in our screening process.
- That acceptance is not automatic and that decisions are based on our assessment of an applicant's ability to meet the requirements of the position, based on a written position description. These requirements may include specific skills and competencies, and may also include traits of character and temperament.
- That further screening may be necessary depending on position requirements. Applicants may be required to submit proof of qualifications, technical ability, experience, license or certification as a condition of acceptance, and from time to time thereafter as appropriate to the requirements of the position. These may include driver license checks, driver abstracts, vehicle insurance, credit checks for those (other than Unit Guiders) handling money, or other checks relevant to the position.
- That screening is ongoing and continues for as long as an individual is in Guiding.

This provides the prospective volunteer with a sense of context of what will happen in screening, why it will happen and what to expect in the future. This will also serve to shape the expectations of the prospective volunteer and give them a sense of understanding that will help them maintain a positive outlook.