

## 55. Bennett, Johnson, Pisierra: Volunteer Management

**0:00:01 Kendall Lott:** Hey PMs, a quick reminder that if you have a topic of interest to present on, consider the University of Maryland's Project Management Symposium, held in College Park, Maryland, in the DC area in May, 2019. Find more information at the website at [pmsymposium.umd.edu/pm2019](http://pmsymposium.umd.edu/pm2019), and submit your abstract by November 4th, 2018 to be considered. And of course, whether you're a speaker or a participant, plan to attend and to learn.

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**0:00:33 Jennifer Bennett:** I think everybody's a lot more open about volunteering and volunteerism being a two-way street now. I think we need to get something out of it, either personal or professional development, or something else.

**0:00:50 Teri Johnson:** No matter whether that volunteer is a fundraiser, or the person handing out the water bottles, or working the registration tent, they need to be managed.

**0:01:00 Valerie Pisierra:** What is your volunteer going to do for you, and how is your organization going to support those efforts?

**0:01:05 KL:** You don't know management until you have managed volunteers. As a Peace Corp volunteer in the Federated States of Micronesia back in the 1980s, I was introduced to structured volunteerism and, specifically, skills-based volunteering. Now, years later, with over a decade volunteering with the Washington, DC chapter of PMI, in management, director and executive roles, and in being a leader for the nonprofit PM4Change, I felt like I was familiar with much of what goes on in the world of volunteers, including managing projects with volunteers.

**0:01:36 KL:** It's always seemed to be different than my corporate management roles. But in this episode, we hear from three volunteer management professionals that tell us no, it's not fundamentally different. What may have changed most over the years is in the way the volunteers engage, and part of that may be generational, and that shifts our focus. It's less that we, as managers, need to be different, but more that we, as managers, need to be better. Those volunteers who are giving their time and their talent for free, they don't have to return our phone calls or attend our meetings, so we volunteer managers really need to be on our toes.

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**0:02:13 Announcer:** From the studios of Final Milestone Productions, overlooking the White House in downtown Washington, DC, this is PM Point of View, the podcast that looks at project management from all the angles. Here is your host, Kendall Lott.

**0:02:25 KL:** Jennifer Bennett is the Senior Manager of Education & Training at VolunteerMatch, a portal that connects volunteers and nonprofit organizations. Her particular niche is working with non-profits to help them better engage volunteers. I called her at her home in San Francisco.

**0:02:42 JB:** This is Jennifer.

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**0:02:46 KL:** Hello Jennifer, this is Kendall.

**0:02:48 JB:** Hi Kendall, how's it going?

**0:02:49 KL:** Doing well. So to get started, how does one become a professional in this space?

**0:02:55 JB:** Yeah, it's oftentimes a career path that people fall into, it isn't necessarily something that people select. The field of volunteer engagement, it is an emerging field, it's not something that necessarily a college student would think, "Oh, I want a career in volunteer management or volunteer engagement." And the field as a whole is doing some of that kind of searching and clarifying around what the work entails, how the work brings value to a nonprofit organization, and what those core skills or competencies are for a leader of volunteers or a volunteer manager.

**0:03:41 KL:** What's your background around this?

**0:03:43 JB:** The work that I started doing was around wildlife rehabilitation and conservation, and really seeing the passion that people brought to that work and wanting to make sure that they were engaged effectively, that they enjoyed what they were doing, that they were well trained for what they were doing, and that's what led me into this path, and I've been at VolunteerMatch about a decade now, working to try to help as many organizations as possible have that same kind of connection with their volunteers.

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**0:04:21 KL:** So tell me a little bit more about VolunteerMatch, how they do that and where they're coming from.

**0:04:25 JB:** So we are a platform where nonprofits can come and post their open volunteer opportunities. We then have volunteers... We have about at 1.3 million visitors a month that come and search through those volunteer opportunities, find a cause they care about, get connected to an organization, either in their community or maybe anywhere in the world. At VolunteerMatch, we want our volunteers to have a great experience, so we want to make sure our nonprofits are well prepared to engage those volunteers.

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**0:05:04 KL:** How is volunteer management, and the engagement with them different or interesting than maybe other forms of engagement with other professionals, or in a non-volunteer form, like a regular workplace?

**0:05:18 JB:** So it's really an interesting mix of both hard skills and soft skills. A lot of times, leaders of volunteers, those that are planning the work of volunteers, are part of that public face of an organization, so they might be the first person or the only person a volunteer meets within the organization. Leaders of Volunteer Engagement are oftentimes also one of the only people in an organization really thinking about risk management, so it's that sort of very soft skills of inviting people in and understanding why they want to help, or how they can help, directing them to that work, potentially screening, training them, supervising them themselves, all the way up through

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managing a budget and dealing with risk management, documentation of activity, putting that information together into a report or into some sort of document to be disseminated to community partners or funders. And it's not just sort of inviting volunteers and then making sure they're having a good time, which is oftentimes what people see on the surface, they don't see everything else that's happening underneath.

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**0:06:38 KL:** You just said some magic words from a PM point of view, which was risk management, you brought it up twice there. Tell me more about the risk management and why that gets highlighted so much in the volunteer management space that you're working with in training them.

**0:06:51 JB:** Yeah, and sometimes it's hard risk. We have volunteers that are going out to maybe come to volunteer at a food bank and there's big equipment, there's maybe knives or other sharp objects involved in doing that food preparation, but also we... We work with volunteers, worry about soft risk as well, making sure that volunteers understand the scope of their work and understand where their decision-making authority starts and stops. What we don't want is a volunteer to go out, interact with a client, or interact with a community member and not know what the right answer is, and try to figure it out on their own. That could be potentially a challenge around public relations or community expectations, but we do a lot of work around screening, making sure we're bringing the right volunteers into our organization, make sure it's the right volunteer for the role.

**0:07:53 JB:** So Kendall, if you wanted to volunteer with me, we might sit down and have an informal conversation about what you were hoping to accomplish with your volunteer time, what you liked doing, whether those were professional skills or hobby skills, if you really wanted to be outside, if you really wanted to be working with children or puppies, we would have that conversation, I'd get to know you. I'd get to know not just what those professional skills are, but are you introverted? Are you extroverted? Are you detail-oriented? Do you want to work on one project at a time, or do you want every day to be a little bit different? And from gathering that knowledge, I would try to find the right fit in my organization for you so that we're taking advantage of that passion, but also those skills and those innate characteristics that you bring as a person.

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**0:08:53 KL:** If this scoping conversation, this sitting down with someone is considered part of the screening, I'm curious, how do we perceive that as different than hiring someone?

**0:09:05 JB:** It's really not, honestly. I don't think it should be, I think it should be really similar. So I hope that everyone who's working with volunteers has that position description, does that interview, whether it's formal or informal, runs a background check if they have volunteers that are going to have access to personally identifiable information, or other types of situations where volunteers might have access to things that need to be kept confidential or could potentially put an organization or a client at risk. We should still be using that same framework that HR sets up for us for how we invite paid staff into our organization, and that same sort of attention to what makes someone a good fit for our organization, whether they're going to be paid staff or volunteer staff.

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**0:10:00 KL:** There's not compensation coming through dollars, the compensation has to come through personal utility.

**0:10:06 JB:** Absolutely. We might have an agreement in place that you're going to come and work on this project, or come this many days a week. But the only thing that gets you through my door is that you like what you're doing, or that you feel like your time is being well spent, you're making a difference, you're helping someone, you're helping your community, but that's not the same as an employment agreement, where I'm paying you and you show up whether you feel like it or not. With volunteers, we really have to make sure that we tap into that passion, that we help them understand, not just what's fun about what they're doing, but why that work matters.

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**0:10:47 KL:** My experience, personally, in volunteer management, has been that retention is the hard part. What is it that a volunteer leader needs to know around this concept of retention?

**0:10:58 JB:** It is a challenge. I think the more we do a good job of managing those expectations, onboarding those right volunteers, providing support, building relationships, that retention can sort of flow from there. I do think there's a change, though, in what organizations and leaders of volunteers expect, versus what volunteers are looking for in their experience. It wasn't that long ago that you might have a volunteer come to you and say, "Oh, I just want to volunteer, I want to get out of the house," or, "I'm retired, I want to stay busy, I'm going to just come in every Wednesday at 1 o'clock forever." And then, in that case, retention is really about just keeping those volunteers in place. What we look at today with how busy everyone is, with what retirement looks like for most people, which is not sort of sitting around and playing golf and having an excess of free time.

**0:12:00 JB:** When we look at most families being two income families, volunteering really needs to be something that fits into this modern, very busy lifestyle, and I think about retention as volunteers that meet that expectation of this relationship. So I don't have a lot of volunteers that I work with, or I wouldn't expect a lot of volunteers to come to me and say, "I want to stay with this organization for 20 years and it doesn't matter what I'm doing." But if a volunteer comes to you and says, "I have some copy editing skills, I saw your material, or your brochure, or your training program out in the community, and I think I can help you." And they provide those copy editing skills, and your new brochure is free from errors, and has great, punchy language in it, and then they move on to the next organization or next activity, to me, that's a success.

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**0:13:02 KL:** So is this indicative of the kind of skills-based shift, where people are saying, "It's not that I have time, but that I have skills?" And then I think I've heard, tied to the idea that people are looking, particularly the younger volunteers that I've worked with, they want to go ahead and have impact, they want to see it almost immediately.

**0:13:18 JB:** I think volunteers of all generations, their time is their most valuable resource, and to feel like that time is not being well spent, or that they're not accomplishing something with that time, or that they can't point to something and say, "This is what I made different or better with my

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time," whether that's a year, a month, a week, or a day, that's what volunteers need to know and that's what volunteers are looking for. So, now skill-based volunteers, if you are trying to build your work portfolio and really show what you've done, if you have time off from your corporation, there's a lot of employees that go out, coordinated by their workplaces, to volunteer. They want to use those skills and that company wants them to use those skills. But that example-setting mom who takes her kids to the food bank on Saturday morning, she wants to know her time's being well spent too.

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**0:14:20 KL:** I know when I'm working in the PMI chapter, that was always a question at the end of the year, how do you show volunteer appreciation for all the people who helped out with functions and programs?

**0:14:29 JB:** If you have volunteers that are coming in and just working on a project for a couple of weeks, I hope you're not waiting till the end of the year to say thank you, or to tell them why that work mattered. So I think what I talk a lot about is incorporating that impact into every day. So it's not just, "Hey, thanks for coming today, we really appreciate your time," it's, "Because you were here today, X happened or Y happened, and because of that, we are now able to do this, or these clients now have access to this piece of the organization or this work." So really trying to make that almost in-the-moment connection between the time and the energy of the volunteer and the outcome within the organization.

**0:15:14 KL:** That feels so much more like resume building, in the sense that, this was important enough that I would write that down to show a potential employer, or somebody who was going to ask me to be a speaker, it's part of my bio that here are things I have done.

**0:15:28 JB:** It depends on the volunteer. So just like when we were talking before about some of those best practices that come around screening, we need to know their motivation for a volunteer coming into our organization, so we know they're the right fit, but also so we know how to say thank you. I might really want to get to know other people who care about the same things that I care about. I want to come to a potluck, I want to get that T-shirt and wear it around town. I need to know if my volunteer's looking for that kind of validation and that kind of recognition, or if I'm a volunteer who's coming in who wants to use my professional-level skills and maybe I'm looking for a LinkedIn review, or I'm looking for some sort of leadership experience that I can take back to my manager or my supervisor at my paid job and say, "Hey, I led this team, and here's the person who supervised me, and here's what she has to say about the great work that I did." So as leaders of volunteer engagement, and the people that recognize the work that volunteers do in an organization, we need to be responsive to all of that as well.

**0:16:34 KL:** You just said one, it's embarrassing for me that I've missed. LinkedIn reviews are not something I often do or think about, but in a volunteer context, that could be the nice payout. Somebody recognized me and told people, "I want to tell you this person was helpful to us." That's a piece of appreciation, I think.

**0:16:51 JB:** Then if I can say to a volunteer, "Hey, I know this project is really intensive right now. We've got to get all these pieces done," or, "We need your time and your talent, but here's what I can do for you at the end, here's how I can acknowledge that, here's how I can recognize it." So you're

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not just getting that personal satisfaction of knowing that you're helping, but I'm happy to write that LinkedIn review, or you can use this brochure that you've just created in your portfolio for your graphics design consulting company you've just opened, or whatever that is. I think everybody is a lot more open about volunteering and volunteerism being a two-way street now. I think you were supposed to just do it because you're supposed to do it, and that's... Humans have never worked like that. We need to get something out of it, either personal or professional development, or something else.

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**0:17:52 KL:** What is a success criteria for volunteer management that is different than an organization's normal requirements of any division, or part of their labor force. Is there additional layer separate from the outcomes of the work they do?

**0:18:05 JB:** I think that there's probably a piece in there around advocating for the work of volunteers in general, that most departments, in either a nonprofit or for-profit organizations, don't have to do so much of. You don't have to try to validate why your employees matter to an organization. If you're running the accounting department, everybody knows that you need those accountants, you need those bookkeepers, they're doing good work, their work is of value, and I think sometimes within non-profits, it's harder for leaders to see the actual value that volunteers bring to the organization, or what that organization might look like without volunteers.

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**0:18:52 KL:** Bringing a volunteer into your organization isn't that different from onboarding an employee. Provide a position description, conduct an interview, do background screening if necessary. Find a slot that matches their skill set and their needs, because even though they aren't getting paid, volunteers want something in return for their efforts. Whether it's a short-term project or a longer commitment, they want to know that they're spending their time wisely, and that their efforts are appreciated. To find out how you can volunteer and be matched, go to [www.volunteermatch.org](http://www.volunteermatch.org).

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**0:19:35 TJ:** I'm Teri Johnson, I'm the Vice President for Volunteer Engagement at The Leukemia & Lymphoma Society, and what that really means is that I'm responsible for setting the strategic direction around volunteer engagement.

**0:19:52 KL:** Teri Johnson believes volunteers can change the world and volunteers play a huge role in The Leukemia & Lymphoma Society. Her job is to make sure LLS provides the right programming and the right tools and resources for their volunteers and their managers. I spoke with Terry in her office at LLS headquarters in Rye, Connecticut.

**0:20:12 TJ:** I'm going to read the mission, which is to cure leukemia, lymphoma, Hodgkin's disease and myeloma, and improve the quality of life for patients and their families. So in order to do that, we must mobilize tens of thousands of volunteers.

**0:20:25 KL:** Why?

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**0:20:26 TJ:** Because in the nonprofit space, the amount of work it takes to fulfill the pillars that we have, it can't be done by the handful of people that your dollars can pay for. The more dollars that we can get to mission, the better. And our volunteers help us fundraise those dollars, our volunteers help us determine which grants we're going to get funded. We have volunteers who are professionals in the medical space who do reviews of grant applications, and we have volunteers who are supporting our patients and caregivers. We have volunteers who are advocating at the state level and the federal level for patient care, and it takes all of those voices and all of that energy to cure cancer.

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**0:21:20 KL:** Can you describe a little bit then, briefly, the types of volunteers you have, in broad categories, and how that is integrated in this organization?

**0:21:29 TJ:** So we have four buckets of volunteers that we have set aside. We have governance volunteers, these would be our national board of directors. These are the volunteers who are professionals during the daytime and they are helping us at that highest level. The next tier, or bucket, is fundraisers. So for us, this includes the fundraisers who might be participating with Team In Training, and they're fundraising and then participating in an endurance sport. They might be the fundraisers who are forming a Light The Night team, and they're walking with lanterns in the fall for survivors. It could be a Man & Woman of the Year candidate who's fundraising over the course of 10 weeks, in lots of fun and creative ways that they come up with, then that money goes to LLS while they're helping to spread awareness. So we have many different products, where they could be fundraisers. This is also our boards of trustees, so every chapter has a board of trustees and these are volunteer leaders at the chapter level, who are... They're connectors, they're fundraising, they're committee leaders, they're thought partners, they're really helping that chapter figure out how they're going to attain those fundraising goals, and participating as fundraisers, in most cases.

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**0:22:52 TJ:** So then we have episodic volunteers. These are those volunteers who show up every year to help with registration at your gala. These are volunteers who might be handing out water bottles on the race line for a Team In Training event. These might also be the volunteers who we know we can call at our chapters because they're just always there, and we say, "We need auction items tagged, can you come in and help us do that? We need a mailing to go out, can you come in and help us organize that?" So they're coming in for a very specific period of time, for a very specific task, and they're so important.

**0:23:29 TJ:** And then our last bucket for that is capacity builders. These are our skills-based volunteers who perform roles or duties that we will just never have the head count to do. So this might be somebody at a chapter level who does social media for the chapter. They build out a social media plan. These are our policy advocates, these are our patient access volunteers, these are the people who serve on our advisory committees, these... We have volunteers who help with operations.

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**0:24:01 KL:** You have very different types of volunteers, so I'm imagining you have some different approaches for all of those, that you have to kind of address all of that.

**0:24:12 TJ:** It's my personal belief that if volunteers aren't doing what we asked them to do, it's because they either are not inspired or they're not equipped. I've been really lucky that in all of the organizations I've worked with, they do a pretty good job of inspiring volunteers. Equipping is the piece that nonprofits tend to struggle with, and so then how I deal with a volunteer, whether they're a governing board member, or they're an episodic volunteer, they need a role description, they need to know what it is we're asking them to do, and it needs to be spelled out. Now, a board of trustee member, I'm going to actually give them a written role description that says, "These are the expectations over the life of service in this particular role, and we're going to talk about that." For a volunteer who's showing up to hand water bottles out on the race course, they're going to get a role description too, but it's probably not going to be written out, it's probably going to be a really quick training.

**0:25:05 TJ:** I'm going to be really clear about what their job is. And the reason for that is, is if we don't help our volunteers understand what it is we need them to do, they're either going to come up with their own rules, which may or may not fit, or they're not going to do anything. We've all had that experience of showing up somewhere as a volunteer and being so excited. "I'm here!" And the organization goes, "Why don't you sit over there while I try to think of something for you to do."

**0:25:33 KL:** Sounds like you have to be as equipped as they are.

**0:25:35 TJ:** Yes.

**0:25:35 KL:** You want them equipped, but it sounds like the organization has to be equipped.

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**0:25:43 KL:** Then how do you define a successful volunteer engagement, in any of these contexts?

**0:25:48 TJ:** I think goals is a piece of a volunteer understanding what we're striving for. So for example, every chapter has a revenue goal. We're going to look at our volunteers and say, "This is the goal, so this is what we're aiming for." We're going to ask those volunteers to be thought partners, we're going to ask them to help us work towards that, by whatever the process is for that product, to get to that goal. But you're going to be clear about it, and then when you're done, you're going to turn around and say, "We achieved our goal, and this is the impact you had."

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**0:26:23 KL:** So are you able to define that after the fact and share that with other executives in the organization? That we met the goal?

**0:26:29 TJ:** We're getting there. Again, nonprofits need to have ways to measure all of that. So most nonprofits are in some stage of working on that.

**0:26:37 KL:** How does someone who needs to structure this at a chapter in any kind of volunteer organization, or for the nonprofit central structure itself, how do they need to start thinking about



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criteria defining the successful engagement of volunteers?

**0:26:50 TJ:** So you have to start with your KPIs, just like you would in any business. I have those, I know what my KPIs are around volunteer engagement.

**0:26:57 KL:** So that would be key performance indicators?

**0:26:58 TJ:** Key performance indicators, and I have both outcomes and outputs. You want to be able to measure things like how many volunteers, how many hours, how long are they staying with a particular organization, so your retention rate, because all of that can be turned into a return on volunteer investment number. And on the other side is the outcome. So for us it's, how many patients did we help? How much money went to research? How many policies did we affect change against for medical care? So these are the outcomes of volunteer engagement, and it is so important that we be able to measure that, and you measure that by knowing what those KPIs are and then you have to start tracking.

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**0:27:46 KL:** So that alone, does that get me to thinking about my... What constitutes a successful volunteer engagement?

**0:27:52 TJ:** One of the big things, for me, is volunteer retention. Are volunteers coming back? Are volunteers bringing other people? And these are the intangibles around volunteer management. When we talk about the return on volunteer investment, there is an investment that every organization makes in training their volunteers, in recognizing their volunteers, in making sure that their volunteers are happy and have some level of professional development, so it's no different than when you hire staff, in that sense. You have an investment, so if you are constantly... Have a churn and burn with your volunteers, then your return on volunteer investment is much lower than when you can retain really great volunteers.

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**0:28:39 KL:** How do you describe to someone, in an annual board meeting, the value, the return on, what did you call it? Return on volunteer investment.

**0:28:45 TJ:** Volunteer investment, yes.

**0:28:47 KL:** How do you describe that?

**0:28:48 TJ:** Yeah, so the first thing you have to acknowledge is the intrinsic value of a volunteer.

**0:28:52 KL:** That's the hard thing to measure, right?

**0:28:54 TJ:** But it's not. The intrinsic value is when we can look at our business and acknowledge that we can't do our business, we can't meet our mission without volunteers. And then you start getting into the nuts and bolts. You begin to look at, what are you investing in the recruiting of a volunteer? So what are you paying for? Are you paying for recruiting tools? Are you paying for advertisements? You start to look at, what does it cost to onboard and train a volunteer. These are

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critical pieces of volunteer management. If you don't onboard and train a volunteer, you will lose them. So what does that cost you? There's a cost in materials, there's a cost in investing in volunteer management software. To be able to manage your volunteers, help them manage themselves, and there's lots of really great tools and resources out there, but they all cost something, so yeah, that goes into the equation.

**0:29:46 TJ:** And then you can use data from Independent Sector, they put out a number every year that says the average value of volunteer is, and I think it's hovering just under or just over \$25 at this point. Or you can go to an organization like Taproot, that says, if the person is providing you skills-based volunteering, in terms of being a fundraiser, or legal assistance, or program management, I can go pull a figure that says a fundraiser is worth \$89 an hour – and that's not necessarily an accurate number – and I can then plug this into the equation. So that's now... If I didn't have a volunteer, and I had determined I had to pay for this service, somebody has determined that's roughly the rate I would pay.

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**0:30:37 KL:** I would imagine that you have a cost against the value of outcomes themselves that are probably measurable. You can say, "We got \$4 million in grants because six people picked up phones over a 30 hour period." There's your number.

**0:30:48 TJ:** It goes into the equation, so those are all factors. You can put as many factors in that equation...

**0:30:52 KL:** Oh, I see.

**0:30:53 TJ:** As you want to, but you have to consider each of those pieces. Yes, there is an outcome value on all of our volunteers.

**0:31:00 KL:** Does it appear as part of the discussions that happen in a sort of financial and mission achievement way?

**0:31:06 TJ:** It should.

**0:31:06 KL:** How is this expressed at an executive level?

**0:31:08 TJ:** We are working out what all of those values and costs are right now, but I absolutely talk about it in terms of, I want to be able to report to our stakeholders. Our national board of directors should know, our fundraisers and our donors should know, that this much equity is being given to an organization in value of volunteer service.

**0:31:32 KL:** Okay.

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**0:31:38 TJ:** The saddest cases of poor volunteer management that I see are the ones where they're not working towards the mission with the organization. So one of the first pieces of information since I came on board that we now give to our trustees, and our fundraisers, and our skills-based

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volunteers is a slide that says, "This is our mission, these are our values, and here's three core beliefs that we're going to ask you to buy into." Every staff member is required to live by these values and to embrace this mission. We're going to ask you to do that with us, because that is the only way that you can form a true partnership with your volunteers. You all have to be working towards the same thing together, and the... What brings a volunteer to an organization is their passion. They're passionate about something, about feeding lots of people, or food insecurity, or curing cancer, that's what's brought them to your organization. That may or may not completely be in alignment with whatever your mission is, so we've got to get everybody on the same page.

**0:32:40 KL:** So what happens to the extent you've seen them not on-mission? Where would I be able to see the problem?

**0:32:46 TJ:** So you're going to see volunteers being resistant. You're going to ask a volunteer to do a task, you're going to give them a role description and they're going to push back.

**0:32:54 KL:** Like, "Why would I do that?"

**0:32:55 TJ:** "Why would I do that? What I really want to do is this over here." It's because they are now... Either they're out of mission alignment with the organization, or they are unclear as to why that task and those responsibilities will have an impact on the mission.

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**0:33:15 KL:** We talk, in project management, about the iron triangle: Cost, schedule, scope. So volunteers look like very low cost labor, so the labor can be provided to help shrink schedules, or to provide more scope, get more work done. But do you observe, and in what way do you capture, really, increases in quality through using volunteers?

**0:33:36 TJ:** Yeah, I'll talk a little bit about some of our patient access volunteers. So patient access has several categories of volunteers, and the roles of these volunteers are things like community outreach, so they might be responsible for connecting with hospitals and doctor's offices, so that they can give our information to newly diagnosed patients or caregivers. So we also have volunteers who, they're called First Connection volunteers. So if you're newly diagnosed with a blood cancer, you may really want to talk to somebody who has had the same kind of blood cancer, so we have patients who are volunteers and will talk to you. So for us, quality is, we want to make sure that if you are a newly diagnosed blood cancer patient, that you have received information and been connected to us within the first 90 days of diagnosis. So we see quality go up in terms of the quality of the connections, the quality of the experience for patients and caregivers, because our volunteers are bringing their skills, their experiences, to bear.

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**0:34:48 KL:** Does anybody have to advocate for the role of volunteers?

**0:34:50 TJ:** All the time.

**0:34:52 KL:** Okay, in what way?

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**0:34:52 TJ:** As a matter of fact, in the last role I had, it was specifically my job to go into nonprofits and help them form their volunteer program. The very first thing we would say is, "We need your CEO's approval." Because there is a bottom line to it, right? And there's all these myths around volunteerism, like volunteers aren't reliable, volunteers don't show up, volunteers are free, volunteers are flaky, that's a big one. You can't hold volunteers accountable, is another myth. And so there are people out there that say, "I would rather burn my team out than have to engage volunteers," or, "I don't see the value of volunteers," or, "It costs too much to train or keep volunteers." So those are the things I start listening for when I'm talking about the importance of volunteering. So I do listen for the questions that I'll get asked where they say, "Well, how do you hold a volunteer accountable?" The same way you hold a staff person accountable: You tell them what needs to be done, you ensure that they have somebody to connect with, to guide them and help them, and you give them a deadline.

**0:36:02 KL:** The accountability there you're highlighting is simply being clear about the expectations, and then being... I think the other shoe here is being willing to roll a volunteer off. My experience is, that's been hard. You're getting someone helping you, how do you say, "This isn't working?"

**0:36:15 TJ:** You never want to have to fire a volunteer. It's awful when you do. What you want to try instead, and this is true volunteer management. Volunteerism doesn't work when a volunteer comes in and either, we don't know what they're going to do, or we give them stuff to do and then we never check in with them.

**0:36:37 KL:** Mmm-hmm.

**0:36:37 TJ:** Would you do that with a staff member? Some people do, and I just consider them really bad managers. But if you want a task done, you're going to have check-ins, you're going to make sure they know who their resources are within the organization. It is no different for a volunteer. And in those check-ins, I might say to a volunteer, "Just want to check, how are you coming on that deadline of Friday for X?" And I'm going to have that conversation on Tuesday, not Thursday afternoon, same way I would do that with a staff member. If I notice they're struggling, I'm going to have a heart-to-heart with them and say, "I'm so glad you're here. How are you feeling about your position? Is it working for you? What isn't working for you? Do you have the resources you need?" And if those can be addressed in a way that helps them, then we're going to do that. Sometimes the conversation ends up saying, "Then let's find another place for you."

[music]

**0:37:32 KL:** So tell me how you train volunteer managers, then. In what ways do you talk to them?

**0:37:36 TJ:** Yeah, so when we're training them, we do train them around that passion piece. What's motivating them? Let's pay attention to that. We also train them around risk. Risk with volunteers is different than it is with staff.

**0:37:50 KL:** Fill it out.

**0:37:51 TJ:** So a risk with volunteers is, they aren't necessarily held to the same standards in talking about the organization. Now, we do, we ask them to sign conflicts of interest, anti-

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harassment, anti-discrimination forms, code of conduct, but not all nonprofits do that. You have a volunteer who goes out there and starts talking about your organization and things they've picked up on the inside, every organization has something that goes awry, or disgruntled employees. And what I remind volunteer managers is, your volunteers never stop being volunteers. So a piece of that guidance is, you should be friendly with your volunteers, don't become friends...

**0:38:33 KL:** Oh, with your volunteers.

**0:38:33 TJ:** With your volunteers.

**0:38:34 KL:** Okay.

**0:38:35 TJ:** And here's the example I give: You become friends with your volunteers and you go out for drinks on Friday night, just like you would with any of your other friends. You've had a rough...

**0:38:46 KL:** Well, or coworkers.

**0:38:47 TJ:** Or coworkers. You've had a rough week at work. Project went downhill, funding didn't come in that you were hoping would, your boss got upset with you, all really reasonable things that if you're talking with your coworkers, you blow it off. You go, "We know, it was just a bad week." That friend who's a volunteer, never stops being a volunteer and what they hear isn't, "You had a bad week." What they hear is, "Wow, your organization is really messed up." Another one is, is a lot of times, nonprofit staff, if they become friends with their volunteers, they get on social media together.

**0:39:23 KL:** Oh boy.

**0:39:23 TJ:** Now, you may or may not get on social media with your coworkers. In today's age, I actually find more people who aren't friending their colleagues...

**0:39:32 KL:** Their colleagues, yeah. It's different.

**0:39:33 TJ:** But now there's a volunteer, they're not a colleague. And you have a political view that differs from the volunteer's political view, and you start posting about that. So when you're managing volunteers, it's about being diligent in areas that... You manage them the same way you would manage a staff member, but there are nuances to interactions that need to take place. And my training for volunteer managers is a day long right now, and I'm working with our learning team to modulate that so that we can break it down, but... And that's the minimum. My training for volunteers used to be three days long. So it is rigorous, and it should be.

[music]

**0:40:17 KL:** Engage with your volunteers just like you would employees, do occasional check-ins, make sure their mission and goals are in alignment with the organization's, all of this should be familiar. And start tracking return on volunteer investment by collecting data, such as number of volunteers, hours worked and, of course, outcomes. She reminds us that your organization's view of volunteers is part of the equation for success. You may find you have to advocate for your

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volunteers and hit some of those myths of volunteering head-on within your own organization.

[music]

**0:40:57 KL:** Valerie Pisierra is the Executive Director for Loudoun Cares, in Leesburg, Virginia. Their mission is to provide life-sustaining and life-enriching resources to residents of the county. They connect those in need with nonprofits and agencies that can help them, and connect volunteers with those nonprofits. How did you get here?

**0:41:19 VP:** I am a military wife, so we were overseas for 16 years. And finding work opportunities for a spouse overseas is a difficult kind of thing, as far as a career type job. So my motivation for volunteering was always to try to keep my foot into the business world, so when, eventually, in my other life, I came back to the real world, as I like to say, I was still going to have that experience. And so it sort of just started building by someone just simply asking me if I wanted to volunteer for the PTSA and be the president, because I was always at the school. [chuckle] So I went, "Oh, okay." [laughter] It kind of all started that way, and expanded into running a European organization called AWAG, which is Americans Working Around the Globe, and it's based on conferences that train volunteers to be better volunteers.

[music]

**0:42:22 KL:** The reason I wanted to get a hold of you was that you do the volunteer management training series. It sounds like it's capacity building, that's kind of part of it, but you're helping the nonprofits, if I understand, be able to manage the volunteers that they get.

**0:42:36 VP:** Right.

**0:42:36 KL:** Am I tracking there?

**0:42:36 VP:** Yes, yeah. So our organization was originally created as a type of umbrella organization to support nonprofits, so when we absorbed Volunteer Loudoun, part of that was to continue the initiative, and part of that initiative was to train nonprofits to manage their volunteers through the Points of Light Volunteer Management Training Series. So we offer that twice a year, in March and September, and it's a three day series of training modules to help the volunteer managers plan, recruit their events and their volunteers for their organizations, and it goes through all sorts of different elements of what you need to do if you're planning on having volunteers in your organization.

**0:43:23 KL:** And we're going to talk about that. And I should let our listeners know, I pulled you out of class today because you're...

[laughter]

**0:43:27 KL:** You're one of the teachers, aren't you?

**0:43:27 VP:** Yes.

[music]

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**0:43:34 KL:** Do you have a situation, or is it common, for the nonprofits to use volunteers to manage projects, or to manage other volunteers?

**0:43:44 VP:** We have volunteers everything from showing up and handing out water at a race, to, we have organizations that are completely volunteer-manned, there's no paid employees at all, so there's a huge range of experience, needs, skills needed. You have volunteers that come in and take their experience from their paid jobs and they put that into the nonprofit organizations through the board of directors, or through... I have a high school student that is working with me, that is helping me with my website and my email, so it's a huge spectrum. We have people that attend the class that are volunteers.

**0:44:24 KL:** I was going to say, so your training, then, must be for people who are about to bring in volunteers, and then also for volunteers who are going to have to manage or bring in other volunteers.

**0:44:32 VP:** Right, yeah, we get a mix of... For instance, in our class right now, we have three participants that are with the Homeowners' Association, so they're all volunteers, but they run the Homeowners' Association.

[music]

**0:44:48 KL:** So I'm noticing, when I look at your curriculum, and I think we'll go over it, we're not attempting to teach the class here on the show, of course.

[laughter]

**0:44:54 KL:** So in highlight, when I kind of look at some of the key things, you talk about understanding the volunteer themselves, exploring the heart of the volunteer, and then planning that program, planning of the volunteer program, doing the recruiting and matching, achieving service excellence, maximizing the volunteer's experience and then improving feedback system. There seems to be a lot about the motivation of the volunteer, why has that become important in this space?

**0:45:21 VP:** Well, I think it's because people volunteer for a lot of different reasons. We like to think that everyone volunteers because they all want to do good in the world, and that, I think, is part of the motivation, definitely, but I think what pushes them over the edge to make that full-time commitment is that they're finding places to volunteer that feed their passion, whether it's to learn new skills, to get experience, to help out a cause, to just get out of the house. And I think that, as an organization, and if you're going to be managing volunteers, you need to account for that and understand, why are they showing up at your door?

[music]

**0:46:03 KL:** I think understanding people's motivation is generally good theory now in management, is the idea of motivation and understanding it. What are the specific steps people can take to identify that? Because it strikes me as you're talking about something deeper than skills matching, like, "Tell me your skills." When you're teaching that part of the course, what is it we're

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trying to find out and uncover, and in what ways do you uncover that?

**0:46:24 VP:** Well, there's a lot. Part of the course, it talks about finding what kind of volunteer they are, are they affiliated kind of volunteer? Are they achievement-oriented? Are they... They want to do it because... A lot of people will join boards because they want to have that influence in the organization, so...

**0:46:48 KL:** Wow, this is straight out of motivational theory.

**0:46:49 VP:** So... Yeah.

**0:46:51 KL:** Power, affiliation and/or achievement, it's kind of the motivational triple, what is it, the triangle they have for that.

**0:46:56 VP:** Right! But I think that, if you think about it in business, when we pick our careers, we do that same thing in our own minds, we think, "What makes me happy? Do I want to be in charge and be the CEO, or do... Am I just happy just getting the task done?" Like, "I want to be able to go, have a goal, get the goal done, woo-hoo! And celebrate myself." It's...

**0:47:17 KL:** How do you get them to sort that out with volunteers coming in, when you're doing the training?

**0:47:21 VP:** They take the test themselves.

**0:47:22 KL:** Oh, you do it through an assessment.

**0:47:24 VP:** Yeah, through an assessment.

[music]

**0:47:29 KL:** You highlight in your curriculum, and I've heard from our other guests as well, that there's been a shift in models of volunteer engagement, or in volunteers' motivations themselves. What are you observing here in Loudon County?

**0:47:43 VP:** I think a lot of it is generational. We work with organizations that are all seniors that volunteer, and their motivation, and how we communicate with them, and their reward system, so to speak, is completely different from, say, my high schoolers or the millennials that come in and they want to make an impact right away. They want to get their hands dirty, they want to show the world that they know what they're doing.

**0:48:05 KL:** So when we start talking about program design or project design, it's pretty clear that you have to know who your market is, what your market or prototypical volunteer will be.

**0:48:16 VP:** And that's part of the whole training, is that planning component of, first of all, why do you need a volunteer? And really think about, what is your volunteer going to do for you and how is your organization going to support those efforts. And also, what is your target market? Are you completely... An organization like Areas Agencies on Aging is going to use a lot of senior volunteers, where a youth program, like ours is... uses... We use high school kids, and so you have



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to understand what motivates them, and how they work, and how they communicate, for you to plan a good program.

**0:48:54 KL:** From a PM's perspective, you've got to charter your program. You've got to define, what's the scope, what you're doing, how you're going to use resources.

**0:49:00 VP:** Yeah. I think the biggest part is that component of, what do I need volunteers to do? Why do I need them to do it? How are they going to... The whole who, what, where, when, how. And by not really thinking about that, instead of just saying, "Okay, I think we need about a 100 volunteers." Well, do you really need a 100 volunteers? Do you need 10 core volunteers and then you need 90 warm bodies? So you have to really think about, what is the function that you're going to use the volunteers for and what skill set do they need. And then also thinking about how you're going to handle 100 volunteers opposed to, say, 25.

[music]

**0:49:45 KL:** When we're doing this recording, there's really deeply embedded, essentially, sexual harassment types of issues. Is that becoming a topic of volunteers? Do you have a code of ethics? What is your position on...

**0:49:57 VP:** Yeah.

**0:49:57 KL:** How we'll be treated if we're volunteers here, in terms of gender equality and other questions like that.

**0:50:03 VP:** And that's part of what we talk to the organizations about, is that...

**0:50:07 KL:** So it is a topic?

**0:50:07 VP:** It is a topic of orientation. So the difference between orientation and training. Orientation meaning, you're orienting them to the policies and your mission of your overall organization, and this is where you address those kinds of things, codes of conduct, and your expectations as an overall volunteer for our organization, our expectations are this. I know, with our youth program, we have a long page of code of conduct, and it also sets you up for the fact that, you know, a longterm volunteer, you may have to ask to leave service.

**0:50:43 KL:** So firing a volunteer, that has to be interesting.

[laughter]

**0:50:48 KL:** How do you help them understand what to do with that? How is that discussed in the training?

**0:50:52 VP:** It is discussed, and it's like, you don't want to wait till that situation arises and then have to deal with it. So you want to put policies and procedures in place, and you want to be upfront with the volunteer about, this is what our expectations are, these are what our policies are, and you understand that if these aren't followed, that we won't be able to have you volunteer here anymore. It does happen, people are always asking, "How do I deal with difficult volunteers?" Because I

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think that's a topic that we all want more information, just dealing with difficult people in general. And when it's a volunteer, sometimes you feel like, "Well, I can't fire them because they're a volunteer." It's like, well, you have to get over that, that you don't have to take every volunteer that comes to your door, that you can create a program that volunteers will self-select out of your program, because they're like, "They want too much," or, "I can't live up to this," and they self-select out, that's what you want to happen. So that the people that come into your organization are the ones that truly understand what you're expecting and what they're expecting out of you as an organization.

[music]

**0:52:01 KL:** What is it that they should really be watching for when working in an organization where they're managing volunteers?

**0:52:08 VP:** I think they have to think of a couple different scenarios of when they're planning things. What happens if we get too many volunteers? What happens if we don't get enough volunteers? What happens if a volunteer gets hurt, or a volunteer does damage wherever we're at? Just that whole...

**0:52:27 KL:** Risk management.

**0:52:28 VP:** Risk management, which...

**0:52:29 KL:** There we go.

**0:52:30 VP:** We talk about that as well.

**0:52:32 KL:** PMs are going to love it. Yeah.

**0:52:32 VP:** Yeah, yeah, we talk about that as well. Because sometimes that's the biggest fear, especially if you think of, for instance, a suicide helpline that's run by volunteers.

**0:52:41 KL:** Oh, don't be wrong on that.

**0:52:42 VP:** You're... They literally have someone's life in their hands, so to speak, when they're talking to them. And so you really have to prepare for them and make sure that they have absolutely everything that they need and that you have the right person in the right position. And that all comes from, for me, I know whenever I plan an event or... I really have to think about, what do I want the end picture to look like? What does my success look like? And I always work backwards, how am I going to get there? Until I get to the beginning which is, okay, what do they need to get to the end?

[music]

**0:53:23 KL:** Your module is on maximizing the volunteer experience. What's important about that, that a volunteer manager needs to address?

**0:53:32 VP:** Well, I think they have to realize that your reward system does not... It's not a reward like getting an award award, it's being accessible to the volunteers, and even as simple as just

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walking up and thanking them for being there, not taking them for granted. And again, it's just good management techniques of, even with your employees. Being there, thanking them for their hard work, making sure if they have any questions or any issues, that those are addressed, and just setting them up for success, I think, is the most important thing and treating them... Not to get into the philosophy of, "they're just volunteers," because...

**0:54:12 KL:** Ah, "Just volunteers."

**0:54:13 VP:** That's a famous phrase that comes from both sides.

**0:54:15 KL:** I was going to say, I experienced it by hearing volunteers use that to say, "That's why I didn't complete the task, I'm just a volunteer."

**0:54:22 VP:** So I think that's a part of... That starts from the orientation. The volunteers have to know that the organization, the paid employees, the supervisors, they want the volunteers to be there, that they want them to be successful and that they buy into the idea of having volunteers in their organization, because there's nothing worse than having the people that are in the organization, paid employees, thinking that volunteers are just more work for them. That's why a well-planned-out program, if you know, why are you having the volunteers, you're wanting them to be there to enhance your operation, not to hinder it. And so when they first come in, if they feel that the organization supports volunteers and gives them what they need, then they feel like it becomes more of a job to them, opposed to, "I'm just volunteering."

**0:55:16 KL:** It might be important to have a good volunteer program design, because you may be setting expectations if you're in a large non-profit with paid staff. We are bringing volunteers, they're doing this, they're not your gofers, they do this. And by the way, they do this and we need this, so don't ignore them. Kind of got both of those things going on. Don't misuse them and don't... Don't underuse them and don't overuse them, right?

**0:55:37 VP:** Yeah, yeah. Collaborate with them.

**0:55:40 KL:** Collaboration.

**0:55:40 VP:** And understand that, again, if you have a strong program, you place the right volunteer in that position, and that volunteer is there to help the organization, and so they're there to help you, and that they can be a source of information and experience that maybe you don't have. And that working together and collaborating together is what's going to be better for the overall picture.

[music]

**0:56:06 KL:** What is success for Loudoun Cares?

**0:56:08 VP:** I see it as being able to connect with as many residents, showing them the value of volunteering for their nonprofits, how that strengthens their community, how it strengthens the nonprofits and therefore, then, strengthens the services that they provide, as well as the nonprofits really understanding the value of volunteers, and what that they can bring to their organizations. And the residents and the corporations to understand how important it is to give back to the community through volunteerism. It allows them to really know the communities that they have

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businesses in, and so I think that that's important for us to keep it a viable place to live and work. Having volunteers learn about your organization, helping them to spread the word about your organization, your volunteers become your best advocates, because if they enjoy a cause and what you're doing, they're going to tell people, and I hope to think it leads to the money, meaning it leads to, then, people wanting to give financially to that organization and wanting to make connections for that organization. You have to, obviously, have funds to do what you want to do, but there's a lot of things that we rely on volunteers to do so that we can have better use of our resources.

[music]

**0:57:33 KL:** Program planning and design should include not only the who, what, when, where, and why of the volunteer force, but you should also consider your target market, the types of volunteers you can expect, what motivates them, and how you can best support them. An online search of volunteer management yields a wealth of helpful sites and articles. Points of Light has a pretty comprehensive catalogue of blogs and they offer volunteer management training. You can also check out [cva.org](http://cva.org), where you can learn how to become a Certified Volunteer Administrator. Your board's sponsors and donors need to know what the role and value of volunteers are within your organization, so be prepared to capture data and report. You are their advocate. And remember, there's no such thing as "just a volunteer." If you manage them well, volunteers can bring unique skills and vital services, and improve the quality of your organization and the benefits it provides.

**0:58:28 KL:** As usual, as PMs, we can focus on the big five areas where these volunteers can help the most: Scope, schedule, cost, risk and quality. And of course, in a project, it's still all about value. In this case, think return on volunteer investment. Make sure your volunteers have a clear understanding of the scope of their roles and the goals. By setting expectations and really trying to meet them, you can make a world of difference.

Special thanks to my guests, Jennifer Bennett, Teri Johnson and Valerie Pisierra.

**0:59:00 Announcer:** Our theme music was composed by Molly Flannery, used with permission. Additional original music by Gary Fieldman, Rich Greenblatt, Lionel Lyles and Hiroaki Honshuku. Post production performed at M Powered Strategies.

**0:59:14 KL:** PMPs who have listened to this complete podcast may submit a PDU claim, one PDU, in the Talent Triangle, Leadership, with the Project Management Institute's CCR system. Use provider code 4634, and the title PMPOV0055 Volunteer Management, or use the PDU claim code 4634114XUE. Visit our Facebook page, PM Point of View, to comment and to get links to more episodes and to the transcripts. You can also leave a comment on the [projectmanagement.com](http://projectmanagement.com) portal, evaluate us on iTunes, and go right to me on LinkedIn. I'm your host, Kendall Lott, and until next time, keep it in scope, volunteer, and get it done.

**0:59:57 S5:** This has been a Final Milestone Production, sponsored by M Powered Strategies.