
VOLUNTEER CONNECTORS AS RELATIONSHIP BROKERS:

Toward an Expanded Role for Volunteer Centers

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Introduction

This paper draws upon a two-year experience with Higher Impact, a project funded by the Corporation for National and Community Service through its VIRE ('09-10) and Volunteer Generation Fund ('10-11) grant initiatives.¹ The Massachusetts Service Alliance and its lead partner, the ACT Volunteer Center of DIAL/SELF Youth and Community Services, targeted Baby Boomers that were currently employed as college faculty or staff and college alumni living in the area, and engaged them as volunteers for schools and other nonprofit agencies serving children and youth. Over the course of the two years the project has engaged over 400 volunteers. The volunteer engagement method was based on three innovative approaches:

1. "Creating compelling opportunities" (Taylor, 2010, PowerPoint slides) that included flexibility in the "what, when and how" of volunteer roles and tasks.
2. Researching and identifying individuals for a specific volunteer opportunity and approaching them with a personalized "ask."
3. Managing volunteer entry, including helping an organization (a) modify a volunteer position so that it fits better with a volunteer's talents, experience, interests and availability and (b) envision and capitalize on ways the volunteer could contribute to program capacity-building.

Cultivating and nurturing a relationship between the volunteer and the nonprofit served was paramount throughout the recruiting and matching process.

¹ Higher Impact was funded in 2010 as a VIRE (Volunteer Impact, Recruitment and Expansion) Program, funded by the Corporation for National and Community Service (CNCS) and administered by the Points of Light Institute and HandsOn Network (POLI and HON). In 2011 Higher Impact continued as part of MSA's CNCS-funded Volunteer Generation Fund Grant.

Background of the Higher Impact Project

The ACT Volunteer Center (www.actvolunteercenter.org), a HandsOn Network (HON) Affiliate, is currently the only full-service regional volunteer center in Western Massachusetts. Its service area includes the predominantly rural areas of Franklin and Hampshire Counties and the North Quabbin region. Its host agency, DIAL/SELF Youth and Community Services (www.dialself.org) in Greenfield, MA, focuses on meeting the needs of area youth, with a special emphasis on school engagement and risk prevention. In addition to ACT, DIAL/SELF operates transitional housing and counseling programs for teens and runs a volunteer program called RISE (Resources Invested in Student Excellence).

The RISE program, started in 2006 at the Greenfield Middle School, is inspired by -- though not directly affiliated with -- the Communities in Schools (<http://www.communitiesinschools.org>) model and seeks to engage community resources -- especially community volunteers-- to provide in-school or out-of-school services to (as of this writing) five middle and high schools. Volunteer

opportunities are developed in partnership with teachers and other school personnel; all volunteer placements require buy-in from the school partner. RISE volunteers offer enrichment programming, academic support, college access, mentoring, and other services designed to augment the educational services provided directly by the school.

DIAL/SELF also operates an AmeriCorps program, YouthServe, with a mission that is complementary to that of RISE. AmeriCorps members serving as Resource Coordinators in each RISE School, and an AmeriCorps VISTA member coordinating the overall program, spearhead the engagement of community volunteers.



Baby Boomer Recruitment

In 2007 the ACT Volunteer Center was one of eight projects funded by the Massachusetts Service Alliance (MSA) for a six-month “Baby Boomer Plus” Initiative. ACT used these funds to conduct initial feasibility research for an “ACT with Experience” recruitment effort. The research project identified several important aspects of Baby Boomer recruitment which included:

- A strong preference among Baby Boomers for volunteering with children and youth;
- One-on-one, personalized recruitment as the most effective engagement strategy;
- The importance of social connections to this age group, and especially of conducting volunteer outreach through existing communities or webs of relationships; and
- Understanding that “Baby Boomer volunteerism is all about flexibility and choice.” (ACT Volunteer Center, 2007)

The 2007 study identified several areas where flexibility mattered most, such as: location, schedule, duration, supervision, and team-based or shared commitments.

Higher Impact allowed the ACT Volunteer Center to put the ideas gleaned from this initial research concretely into practice. The design of the project included three salient features:

- 1) Recruitment focused on *pre-retirement* adults aged 45 to 64;
- 2) Recruitment of specifically targeted *college faculty and staff* (and to a lesser extent, alumni) through outreach at nine institutions: Amherst College, University of Massachusetts/Amherst, Smith College, Mount Holyoke College, and Hampshire College (known locally as the “5 Colleges”), Greenfield Community College, Holyoke Community College, Mount Wachusett Community College, and later Westfield State University; and
- 3) Volunteer opportunities focused on the *education* issue area.

Volunteer placement was primarily in DIAL/SELF's RISE program, but Higher Impact also engaged other program partners serving schools and school-aged children, e.g.: Volunteers in Public Schools programs, a special education advocacy program, and a Big Brothers Big Sisters mentoring program.

Characteristics of the "Boomer" Profile

The design of the Higher Impact project allowed MSA and ACT to test assumptions about the changes in traditional volunteer opportunities and recruitment messages that would be necessary to attract and retain the 21st Century volunteer. While acknowledging the diversity of volunteers in this, as in every generational cohort, we chose a target population that could be expected to exhibit most of the characteristics of the "Boomer" profile that have been discussed in the existing literature, e.g.:

- A high level of knowledge, skills, experience, and prior career achievement (but still varied, given the wide range of staff and faculty roles);
- A busy life that includes full-time or part-time work, family and community commitments;
- Changing expectations about when, if at all, they will retire and how they would prefer to use both current and future personal time; and
- A variety of social, collegial and institutional ties that could be tapped to broaden the recruitment pool.

Successes and New Learning from the Higher Impact Project

Successes achieved in recruiting college-affiliated “Boomer” volunteers essentially confirmed our expectations about what works. During the first six months of the project volunteer engagement was slow and tedious, but by the winter of 2011 ACT’s Higher Impact effort had become, in the words of its RISE Massachusetts coordinator, “a **well-oiled machine.**”

By May 2011 the Higher Impact Coordinator was able to engage 22 Higher Impact volunteers from area colleges within a one-month period and reported enthusiastic response to the invitation for personal volunteer engagement from virtually all the college faculty she approached.

Contrary to the prediction by some that this would place additional demands on already overcommitted community volunteers, we found that a personalized approach, with a volunteer opportunity that was uniquely designed to use their talents well, could make volunteering a “stress buster” rather than an additional source of stress for these busy, highly engaged community members.

Successful Recruitment Strategies

1 Replacing the term “volunteer” in position titles and descriptions with words like “coach,” “ambassador,” “consultant,” “mentor,” “Advice Artist,” and even “vendor” (a term used to describe volunteers that served as career advisors at a high school career fair). Titles remained descriptive of the actual service being done, but the use of more

contemporary language helped attract people to the positions.

2 Offering a variety of opportunities for one-time or short-term commitments, especially those that allowed some flexibility in scheduling, e.g., being a guest speaker in a classroom or at a school assembly; speaking

► A personalized approach, mixed with uniquely designed volunteer opportunities that utilize individuals’ talents, makes volunteering less stressful for busy, highly engaged community members.

with students about career paths at a school-sponsored career exploration event; or submitting a written contribution for a booklet offering career advice.

3 Customizing volunteer opportunities, so as to meet the volunteers' needs and use their skills as fully as possible. For example, a college dean who previously had been a K-12 teacher was initially referred for direct service in an after-school academic enrichment program but quickly moved into a consultant role. As a consultant he helped connect the middle school with the college's admissions department and referred student tutors by connecting the enrichment program with on-campus peer tutoring programs. By tapping this individual's unique talents the program leveraged valuable resources, and at the same time the Higher Impact project gained an influential champion.

4 Developing carefully-crafted opportunities in which a Boomer-aged faculty member and a group of students served together on a project. Examples included: college athletic coaches that joined

an after-school tutoring program in which their student-athletes were already serving; and a faculty member working together with her students to re-design a mentoring agency's website. The program manager at the mentoring agency expressed initial concerns about the amount of internal staff time that would be needed to achieve the desired level of quality from the volunteer project. However, the volunteer center helped establish a clear agreement to ensure that the faculty member stayed highly involved and the students were well supervised. As a result the website product surpassed expectations, and both volunteer and agency satisfaction remained high.

Involving experienced "Boomer" volunteers

5 as capacity-builders for the volunteer recruitment and support function itself. Higher Impact has tapped the skills of an energetic group of "Ambassadors" – including some senior level university administrators – to champion the effort to engage additional college faculty and staff, and to help broker relationships between their colleagues and the ACT Volunteer Center.

Finally, Higher Impact was not only a recruitment effort, but also a collective learning experience for participating volunteer programs. The program was launched with a day-long training and action planning about Baby Boomer engagement, conducted by nationally known expert Andrea S. Taylor, Ph.D. who is associated with the Intergenerational Center at Temple University.

Throughout the first year, program managers from Higher Impact participating programs came together regularly for additional workshops. Topics included: “Using Volunteer Leaders in Education Focused Programs;” “Engaging College Faculty and Staff as Volunteers;” and “Professionalizing Volunteer Roles for Leadership Development.” This approach fostered a sense of community and relationship among the nonprofits, mirroring that of the college communities within which we did the recruitment.

As a result, when ACT referred a Higher Impact volunteer to an organization that found it was not a good fit, programs were not only receptive to, but actually encouraged use of a resource-sharing approach (not always typical for volunteer programs) in which they would refer the volunteer to a colleague in a different organization whose needs fit the volunteer’s interests more closely.

In short, we found that appropriate marketing messages; developing specific volunteer opportunities built around the individual’s interests, expertise and experience, and motivations; and especially investing time in brokering and cultivating solid volunteer/agency relationships, could all transcend an initial perception that volunteering is a burden rather than an opportunity.

Challenges for Nonprofits, Opportunities for Volunteer Connectors

The greatest challenge presented by the Higher Impact engagement model is that it is a time-intensive approach. The process of developing and customizing roles; researching and targeting a prospective volunteer; crafting and making the initial “ask;” continuing the dialogue between the nonprofit and the volunteer in order to hone or “sculpt” (Taylor,

2010) the volunteer position to fit the individual’s unique needs; and managing organizational entry with periodic re-negotiation of the role, requires a large expenditure of one of the scarcest resources available to a nonprofit’s volunteer management function: **time**.

Most nonprofits, both in Massachusetts and nationally, have extremely limited internal resources for volunteer recruitment and support. In 2011 MSA convened a Capacity Building Committee with representatives from regional nonprofit centers across the Commonwealth of Massachusetts.

They verified the following trends that are also documented in national research (McCurley & Lynch, 2006, pp. 22-24 and The Urban Institute, 2004):

- a) Nonprofits typically staff their volunteer management function with less than a full-time employee (either someone working part-time at the organization, or a full-time person whose role encompasses various other roles such as case manager or office manager); and
- b) There is high turnover in volunteer management positions, making it hard for organizations to develop the expertise they need to take these more customized recruitment approaches to scale.

In light of these trends the potential of a volunteer connector to extend the staff capacity of the nonprofits it serves is great. However, it is generally under-recognized and under-utilized.

It's Not Just About the Boomers: Preparing Nonprofits for Broader Sector Transformation

The large and fast-growing cohort of Baby Boomers that is widely expected to transform the theory and practice of volunteer management as they replace the “Greatest Generation” retirees in the volunteer force (Corporation for National and Community Service, 2007 and Center for Health Communication, Harvard School of Public Health, 2004) has been the central focus of the Higher Impact project. Yet the motivations, needs for scheduling flexibility, requirements for volunteer roles, and attitudes toward organizational loyalty characteristic of Baby Boomers are equally applicable to all subsequent cohorts that constitute the work/volunteer force of tomorrow (Taylor, 2010, handout and training workshop).

Nonprofits need to broaden the range of volunteer roles offered; involve prospective volunteers more actively in designing or customizing roles; and manage these relationships with the aim of deepening the volunteer's commitment over time and increasing opportunities for that volunteer to add value in ways both foreseen and unforeseen.

The intensive nature of this work with both volunteers and nonprofits in opportunity design, recruitment, matching and follow-up highlights the essential role of the volunteer connector as a partner for schools and nonprofits. The successful strategies developed and the challenges faced by the Higher Impact initiative suggest that in the future, as older volunteers retire and more volunteers fit this profile, volunteer connectors can maximize their value by expanding their menu of services for nonprofits as well as for individuals.

An Expanded Menu of Volunteer Connector Services

A typical volunteer center:

- **Posts opportunities** developed by nonprofits for one-time or ongoing opportunities at varying organizational levels from direct service to leadership level;
- **Refers individuals** interested in those opportunities to the nonprofit involved; and
- **Organizes and manages days of service** that involve corporate and community volunteers in one-time projects at area nonprofits.

With the exception of the service days that it manages directly, the volunteer center functions as an almost transparent link between the volunteers and the organizations in which they serve. The primary relationship is between the volunteer and the nonprofit; the relationship of each with the volunteer center tends to be brief and transactional.

Volunteer Centers like HandsOn Network affiliates or (City) Cares programs that serve as intermediaries for “flexible volunteering” handle not only the **volunteer recruitment, screening** and **orientation** but also the **actual**

project management on behalf of the agencies served (albeit working in close partnership with those agencies).

In this approach the volunteer’s primary relationship is usually, though not always, with the volunteer center, and secondarily with the nonprofit through which they volunteer. Nonprofits gain access to high quality volunteer management despite limited staff, but may sacrifice the opportunity to deepen or expand the volunteer’s commitment and contribution to the agency over time.

The Higher Impact project piloted a model that bridges these two approaches. With few exceptions, ACT did not directly engage Higher Impact volunteers in managed service projects. However, its role in recruiting and supporting referred volunteers went well beyond the services typically offered by a volunteer center.

During the course of Higher Impact, ACT and MSA engaged deeply with participating nonprofits to provide some or all of the following services:

1. **Assess the organization's volunteer needs, and craft new opportunities and position descriptions** that clearly outline not only the **tasks** to be performed and the **qualifications** desired, but also the **impact** of the volunteer opportunity, **benefits** for volunteers, and opportunities for **flexibility** in location, scheduling or the manner of carrying out the role; and post them via ACT's HON affiliated website.
2. **Create marketing messages and materials** that incorporate **language, terminology,** and **visual images** designed to appeal to the target population; and disseminate them via print and social media.
3. **Conduct research** to identify individuals in the higher education community with potential to have a "high impact" as volunteers; approach them with **personalized recruitment presentations**; and refer these volunteers to appropriate opportunities with participating schools or nonprofits.
4. **Manage volunteer entry**, including follow-up with both agency and volunteer to monitor satisfaction – an iterative process that sometimes involves multiple phases of **re-designing the volunteer role** initially envisioned. The payoff for this time-intensive matching process is that some Boomer volunteers, increasingly invested in a volunteer opportunity where they feel well used, have been generous in sharing their strong community connections along with their passion and know-how.
5. **Engage Boomer volunteers as "Ambassadors,"** partnering directly with ACT Volunteer Center to expand volunteer recruitment capacity by **engaging volunteers directly in volunteer recruitment or support functions.**
6. **Provide training and technical assistance** to help volunteer managers learn to **transform their volunteer programs** to meet the needs of Boomers and beyond.

To meet the increased need for more customized, relationship-based and labor intensive approaches to volunteer engagement that our Higher Impact experience portends, volunteer centers might consider expanding their menu of services with a tiered approach such as the following:

Level 1: [Volunteer Needs Assessment](#). The volunteer center provides technical assistance to program or agency staff, helping to create new volunteer roles or modify existing ones that will appeal to the “volunteer of the future.” Volunteer center services include coaching internal staff as they develop position descriptions and marketing messages. Primary responsibility for volunteer outreach and recruitment rests with the agency’s internal volunteer management staff, which also handles all follow-up support to existing volunteers. At this level of service programs may choose to list positions on the volunteer center’s website, but the volunteer center does not recruit actively for these positions.

Level 2: [Volunteer Recruitment and Referral](#). In addition to the services described in Level 1, the volunteer center provides a complete, customized set of “front-end” volunteer engagement services that include posting opportunities; researching and targeting potential volunteers; conducting targeted outreach via face-to-face, print, and/or social media contacts; and making referrals to the agency where the volunteer will serve. The volunteer center’s involvement ends once the referral is made.

Level 3: [Comprehensive Volunteer Recruitment and Referral](#). Services at this level, like those of Level 2, continue to focus on the “front end” (i.e., outreach and referral) but may also include some initial follow-up with the volunteer and the nonprofit to help turn the referral into an actual volunteer match. Since “Boomer-friendly” volunteer positions may intentionally be designed as one-time, short-term or occasional opportunities, the volunteer center’s services to the nonprofit may include help thinking of ways to extend, deepen or continue the volunteer’s engagement once the initial volunteer commitment has ended; or to re-design an opportunity to make it more flexible or tailor it better to a volunteer’s talents and interests.

Level 4: Full Service Volunteer Recruitment, Referral and Relationship Management.

In this model, the volunteer center maintains deep engagement with both the volunteer and the organization where the volunteer is placed for an extended period of time after the initial referral. In contrast with the managed project model typical of many HON Volunteer Centers, all levels of service outlined here assume that volunteer screening, selection and placement, orientation and training, supervision, and recognition are the sole responsibility and prerogative of the agency in which the volunteer is placed.

However, at this level of service the volunteer center checks in regularly with both the volunteer and the organization about satisfaction, and provides consultation and “relationship broker” services (where appropriate) to help make it work. This model truly represents an internal/external partnership between the often overextended staff of the volunteer program or agency, and the volunteer center personnel.

Each of these levels carries implications for the resources volunteer centers will require, and the funding levels and possible cost-shares (or other funding models) required to implement them. This type of service will be extremely price-sensitive, given that so many nonprofits invest little or no resources in staffing their volunteer management function, and those that do run volunteer programs may believe that they are already adequately staffed. It will be essential for volunteer centers to provide information demonstrating the return on investment to their constituents – especially the assistance they can provide to transforming the sector with non-traditional volunteer recruitment strategies such as those we have described in this paper.

For the volunteer center itself, staffing models that currently operate successfully in Massachusetts include engaging service corps members (e.g., AmeriCorps, AmeriCorps VISTA, or state-run service programs) in direct volunteer engagement, support to volunteer center technology, and marketing/communications; or engaging and training volunteer leaders as consultants to provide neighborhood-based volunteer connector services to organizations.

Sustainable infrastructure for expanded volunteer center services will require diverse funding sources that might include: a consortium of funders encompassing United Way, government and quasi-governmental grant-makers, community foundations, and local businesses; a tiered membership structure that provides services directly to nonprofits and programs; services provided to volunteer managers through their membership in an Association of Volunteer Administrators (AVA) or regional volunteer coordinators' network convened by the volunteer center; and/or modest fees for levels of service beyond the basic opportunity postings, as outlined above.

Conclusion

For the foreseeable future, we suggest that the relationship-broker model of volunteer engagement described in this paper works best when used alongside more traditional recruitment strategies, rather than replacing them. The volunteer programs that partnered with us for Higher Impact frequently pointed out that their funding support is strictly tied to the number of direct service volunteers (e.g., tutors, mentors, special education advocates) that they engage for ongoing roles. By contrast, the value of Higher Impact volunteers was realized most fully in short-term and/or capacity building roles.

Given anticipated demographic shifts, we predict that within 10 years volunteer programs will need to incorporate the new structures and new recruitment strategies that we piloted through Higher Impact into virtually all volunteer roles. By partnering with volunteer centers for "relationship-broker" services in specific, delimited ways during this transitional period, nonprofits will find themselves prepared when the future – in which Baby Boomers are the prototypical volunteers – becomes the present.

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