

Five Rules for Effective Volunteer Projects

Non-profit organizations, as well as businesses, frequently find themselves relying on volunteers to execute on projects necessary to obtaining the funding required by the organization's mission. And in these days of decreased funding for staff positions, the use of volunteers is increasingly important.

Yet, we tend to not practice good personnel management guidelines when interacting with volunteers. It is as if we place volunteers into a different resource class than our staff. Yes, volunteers are different – they do not collect a paycheck or certain other benefits from us. But, they are indeed just as critical to our success. I have found that by applying the following five “rules” I was able to obtain the best from each and every volunteer.

Rule #1: The Right Volunteer for the Right Job

How many times have you expressed elation at filling a volunteer role only to later find yourself regretting it because the “found” body is not able to do the needed work? Filling a volunteer position on a project is just as crucial to a non-profit's success as filling a paid position. Yet we are hesitant to apply the same level of discipline to the process.

When recruiting to fill a volunteer position, we resist asking the candidate why they want the position. Instead we assume that they responded to our request because they share our passion about the organization's mission. The reality might be they volunteered because they need to do a community service or they want to be on a committee with one of their friends. Or they have some other reason. Without knowing the “why”, it will be difficult for you to judge the individual's commitment or flexibility.

One note of importance here: Recruit your committee chairperson first and then be sure that chairperson is involved in all subsequent recruiting activities. That chairperson is the individual to be held responsible for the success or failure of your project. They need to be comfortable that they have the right folks on their committee, or project team.

When recruiting volunteers, it is important to review what the candidate brings to your organization. A review and discussion about their resume will permit you to understand their background and experiences. For instance, if they held a position in a retail environment, they might have excellent design skills and could be great on a decorations committee. Or, if they held a finance position, perhaps they could handle the budget tracking and reporting for the project. You should also explore with the candidate what they enjoy doing. Maybe they want to do something that provides them with a chance to be creative or to apply some newly acquired skills. The important thing is to have the discussion and to understand the candidate's motivation and skill set.

Rule #2: Define the Job

Prepare a position description in coordination with your assigned committee chairperson and be certain you review it with the volunteer. Be sure the description includes a clear discussion about expected

performance, including security and confidentiality considerations as needed. If the volunteer is going to be using your organization's technology or facilities, be sure the position documentation explains their responsibilities regarding the safekeeping of that property. Ask the volunteer to read and observe any pertinent corporate policies, such as discrimination or harassment policies.

Once you have identified a qualified volunteer, be sure they know what is expected of them. Have a discussion about the anticipated effort, including frequency and location of mandatory meetings and other events. Share the project's work breakdown structure, if it exists, and other scoping documents, highlighting where the volunteer's efforts would fit in.

If the volunteer is new to your organization, schedule a tour with them. Provide literature and encourage them to explore the organization's website. You might consider inviting the new volunteer to meet others with whom they would have interaction, perhaps at an informal lunch or over coffee. If you already have a project team (committee) in place, the candidate should be invited to attend the next meeting, to "try out" the committee before committing.

Finally, review the project's overall organizational structure with the volunteer, ensuring that there will be no potential conflicts within the project team, that all assigned volunteers will be able to work together harmoniously. If you sense there could be conflicts, consult with the assigned committee chairperson and determine together what to do. Perhaps one of the volunteers could be reassigned to another project supporting the organization, or maybe the potential conflict could be resolved within the project. Again, the importance at this time is to acknowledge the risk of conflict exists and to prepare a mitigation plan so that it doesn't affect the project's performance.

Rule #3: Communicate Frequently (and Listen!)

Keeping volunteers informed and connected is the lifeline of your relationship. Be sure you communicate with them as frequently as you do your staff, and perhaps even more so! Remember, your staff are connected to your organization's informal communications network, the volunteers are not. Let the volunteers know when there is a significant event within your organization, such as reorganization or a promotion, even if it does not affect their project. It will make them feel more connected to your organization and to its overall mission.

Schedule periodic one-on-ones with key volunteers and ask them how it is going. Be prepared to address their concerns and questions.

Reinforce communications within the project teams. Consider leveraging technology such as Facebook to support communications. Team members can use it to keep each other apprised of progress. If you are the project manager, conduct efficient team meetings on a regular schedule, at a time and location that is convenient for the majority of the team. Distribute meeting agendas and handouts at least 24 hours before the meeting, so that attendees can be prepared, and meeting minutes within 24 hours after the meeting.

Rule #4: Be Prepared to Reassign a Volunteer

Unfortunately, sometimes we need to initiate a change to our volunteer assignments. It can be because the volunteer is no longer available, or perhaps the volunteer is not able to perform as needed.

When this occurs, a discussion with the volunteer should be initiated. Remember, this is someone who had shown sufficient interest in your mission to join the project team, to invest of themselves up to this point. You owe it to that person to explain honestly why the change is needed. Together, you should explore options that exist for that volunteer to continue to support the project if they want to. If there truly is no suitable role for the volunteer on that particular project, you should explore other projects within your organization that might be better suited to that volunteer's abilities.

If the change is needed because team dynamics are not working in the best interest of the mission, you should determine if the volunteer is suited for your organization. If he or she is, then do your best to identify another position for that volunteer. If not, then you need to gracefully thank the volunteer for their efforts and explain that there is a mismatch between their work approach and the culture of your organization.

These are not easy or pleasurable discussions. It is never easy to dismiss someone, but, you must do it for the sake of your mission. If you feel uncomfortable holding these discussions, ask someone in your personnel department or management team to provide you coaching and to let you do some role-playing as you prepare to take action.

Rule #5: Cultivate the Good Volunteer

It might be trite but it is worth saying: A volunteer in hand is worth two in the bush. Good volunteers are a scarce commodity. We need to invest in our volunteers, cultivate them, groom and grow them. Contemplate how you are going to keep a good volunteer interested and connected with your organization upon completion of this project assignment. Is there another role they can perform for you? Are they a candidate for a more influential role, such as serving on an advisory group or a board? Can they take on increasing responsibility and manage a project for you? Develop a "volunteer progression plan" for them, increasing their exposure to and within your organization.

Be certain to thank that volunteer (you should thank ALL volunteers, frequently and sincerely, but especially those that are performers) and let them know they are truly appreciated. Recognize them as a contributor to your organization's goals. These volunteers are not giving money, but they are giving their time, an equally important resource for your organization.

Summary

Volunteers are critical to our success within our projects. We need to ensure we treat them as such. By following these 5 simple rules, we should be able to maximize the value our volunteers provide and the benefits they receive by working with us.

About the Author

The author of this series, Karen R.J. White, PMP, PMI Fellow, is the founder of Applied Agility. An independent consultant with over 25 years experience assisting organizations manage projects, she has assisted organizations as diverse as Fortune 1000 companies to government agencies to local philanthropies more effectively manage projects, projects ranging from fundraising efforts to technology improvements and business process reengineering. Recognized internationally as a leader in the development and management of volunteer-based projects, Ms. White has spoken on the topics of project management and technology management at numerous conferences. Ms. White is the author of the acclaimed **Agile Project Management: A Mandate for the 21st Century**, (Center for Business Practices, 2009) and a contributing author to the **American Management Association's Project Management Handbook, 2nd Edition**, as well as the 1st edition of the acclaimed **Project Management Maturity Model**.

Ms. White was named a Fellow of the Project Management Institute, from which she also received the Distinguished Contribution Award, in recognition of her contributions to society and the profession of project management, including the development of an international code of conduct for the profession. A former chair of the Institute's Education Foundation and a former member of the Institute's Board of Directors, Ms. White was recently asked to serve again on the Institute's Ethics Review Committee. She is also a member of the Association of Fundraising Professionals and an advocate for the American Cancer Society, in addition to being an active volunteer at the Concord Hospital Payson Center for Cancer Care.

About Applied Agility

Applied Agility is a NH-based consulting company established to assist community-based non-profits and small businesses achieve their strategic objectives with efficiency and agility, through the application of those project and portfolio management disciplines that have assisted large entities achieve their objectives. By providing customized workshops and one-on-one mentoring, Applied Agility prides itself on effectively maturing the skills, knowledge and practices of all clients.

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