



## Volunteer Management in These Times

*Presented by the Center on Budget and Policy Priorities' Get It Back Campaign*

Recruiting and retaining volunteers can be difficult, and 2016 was particularly challenging. This training focuses on dealing with change and challenges in volunteer program management.

### **The Multiplier Model**

- The multiplier model is one where a small staff aims to recruit large numbers of volunteers to maximize impact
- At [Volunteer Maryland](#), four state-level staff manage 32 AmeriCorps volunteers. These AmeriCorps volunteers then recruited over 8,000 volunteers across Maryland.
- Many VITA programs also follow this multiplier model

### **Recovering after a challenging year of change**

*Challenges facing VITA sites*

- TaxSlayer
  - New software required organizations to redevelop materials and re-train volunteers
  - Calculation errors and reliability issues with the new program frustrated returning volunteers
- Volunteers
  - Returning volunteers needed to be trained in the new software
  - Tax returns took longer due to the new software/format
  - Increases in returns with self-employment income from gig-based economy (Uber, Lyft, etc.), which meant more complicated returns
  - Advanced training was required to help volunteers handle these tasks

*Try approaching changes in the VITA program like raising a baby:*

- Be understanding and patient; don't expect your volunteers to know/understand everything right away

### **Understanding volunteer motivation**

- Taken from Jonathan Haidt's *The Happiness Hypothesis*:
- In every decision, there's a "rider," an "elephant," and a "path"
  - The rider is reason, the elephant is emotion, and the path is environment/circumstances
  - The elephant will always win a dispute with the much smaller rider
- The solution? Direct the rider, motivate the elephant, and shape the path. Appeal to volunteers' emotional motivations.
- The emotional "elephant" isn't swayed by facts or logic or reason. Find an appropriate, empathetic incentive for your volunteers to buy into your approach.

- Improve volunteer retention by:
  - Making things as clear as possible—the “rider” (logic) shies away from ambiguity
    - Show off past accomplishments!
  - Keeping the “path” clear—make the process as painless as possible
    - Ask for volunteer input; they’ll have the clearest picture of the actual obstacles
  - Having motivating factors be as clear as possible—the “elephant” tends to wander if its motivation isn’t straightforward

### **Preventing volunteer drop-off**

- What motivates the elephant to stick through the changes, the work, and the off-season?
  - Keep your volunteers engaged during the off-season. Ask your volunteers about their motivations and what they need to keep engaged.
  - Tailor engagements to your volunteers. Lunch and learns help you get everyone together and explore a variety of topics.
  - Hold focus groups in the off-season. They allow volunteer input on future changes, encouraging participation by providing an example of higher levels of engagement

### **What are the barriers to implementing organizational change?**

- The Five Widening Gaps—five barriers to implementing organizational change
  - Low Trust
    - Divisions between departments or between staff/volunteers
    - Distrust of management—changes that go unexplained to staff/volunteers
    - Hidden agendas or politicking among staff, board members, or volunteers
  - Lack of Focus
    - Too many incentives
    - Scope creep, such as where programs adapt to chase funding rather than address the needs of the community
  - Poor Capability
    - People in roles not appropriate for their skills and talents
      - At your VITA site, is your site coordinator able to communicate effectively with volunteers?
    - Roles and relationships not clearly defined within your organization
    - No clear workflow path, tasks not clearly assigned to staff and volunteers
  - Weak Commitment
    - Leadership is not present or available/responsive to the questions and needs of volunteers and staff
  - Delayed Results
    - Unclear goals, lack of accountability, no feedback on progress for volunteers

### **Identify areas of support and resistance**

- Build a network of allies. These people will be your change agents. Who are the allies in your volunteer program? Target those who have direct tie to your mission.
- Followers and friendly supporters are there to lend their vote and help change public opinion as a group

- Challengers as individuals will passively oppose. If organized as a group, they can voice significant resistance to change. Engage challengers by inviting them to participate. Listen to their concerns and clarify misconceptions
- Blockers are decidedly opposed to change and will use their influence to block progress. Actively include them as part of the coalition, giving them a stake in the outcome.

### **Implementing a growth mindset**

- How we think about our talents and abilities impacts outcomes—improve your volunteer program by thinking positively about your staff and volunteers’ abilities and talents
- By maintaining a “growth” mindset, you can approach organizational challenges in a constructive way
- How do you present an organization in ways that encourage volunteers to join?
  - Make the culture of your organization one that’s “growth”-oriented—providing that culture will attract like-minded people who are more willing to adapt to any changes (like a change in tax software!)
- Figure out who your “growth” mindset volunteers are—they will be reliable peer leaders among other volunteers

### *Starting with the “WHY” in your messaging*

- Knowing your “why” is a great starting point for developing both programs and volunteer recruitment/retention messaging
- Your “why” is the belief of your organization—for VITA sites, it’s often a deep belief in economic equality and social justice

### *Examples of using the “why”*

- Court Appointed Special Advocates for Children (CASA)
  - Volunteers are advocates and mentors
  - Offered high levels of support for volunteers to connect them to the mission and each other, since their work was often done at an individual level and could be emotionally draining.
- Conflict Resolution Center (CRC)
  - Faced recruitment barriers through the required 40-hour training and certification
  - Volunteer coordinators made sure to personally thank every volunteer, improving morale and strengthening volunteers’ commitment to the organization and its goals

### **Make Tax Preparation Sexy**

- Clearly focus on community needs and the role the volunteer will play in addressing those needs
- Find ways to make training sessions interesting and engaging (secret: taxes can be dull)

### **Questions**

1. *The two-step log-in process is being rolled out for TaxSlayer this year (where volunteers will be prompted to verify log-ins on a computer with a code texted to them). How can a VITA site best help less computer savvy volunteers, who might not be as quick to adapt?*
  - Just be there to support volunteers who are having trouble. If needed, provide a phone to volunteers who don’t bring a phone to the site

- Make sure to support and encourage those who have trouble with the technology; slow down – what seems obvious to show someone may be a mystery to them