

**A White Paper.**

Written on behalf of the British Psychological Society, (BPS). Sponsored by the Cognitive Fitness Consultancy and also the Division of Occupational Psychology, (DOP), which forms a part of the BPS.

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*“It was the volunteers who made the 2012 London Olympics really special for me. They brought out the best in the visitors, the city and the country”*

Andrew Hoy, Australian Equestrian Olympic Gold Medallist

This White Paper has been written in good faith and, whilst being written on behalf of the British Psychological Society, does not represent the views of the Society, but rather, represents the personal views of the paper’s author, Fiona Beddoes-Jones, PhD, who is a Chartered member of the Society and who was asked to do the original Literature Review and research.

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## 1. Introduction.

In the twenty-first century and an 'age of austerity' post the global financial crisis of recent years there are many organisations in the United Kingdom, (UK), and elsewhere, which rely on volunteers to achieve their stated purpose and objectives. Within the UK, these include the Church of England; most educational establishments; third-sector charitable organisations as well as government agencies such as the Police; the Fire Service and Her Majesty's Coastguard.

This White Paper synthesises and adds to the body of relevant literature surrounding volunteer management and leadership and provides guidance and support to those people who are responsible for the effective leadership and management of volunteers. You will find some useful suggestions and checklists here.

Whilst this White Paper has been written within the United Kingdom, the literature review I conducted was a global one, and specific cultural differences aside, I very much hope that the recommendations I make regarding how to engage, lead, manage and support volunteers will be just as applicable in other parts of the world as they are within Europe and the UK. All research interviews were conducted within the UK.

I should probably explain why I've called this paper *Herding Cats*. If anyone finds this offensive in any way I can only apologise. I don't mean to imply in any sense that volunteers are independent, unruly or impossible to organise! To explain my use of the metaphor, let me tell you a story; In the Spring of 2014, as I didn't book the vet quite quickly enough, my daughter's new kitten became unexpectedly pregnant. She went on to have four beautiful kittens; all identical, and we couldn't bear to part with any of them. As our kindle of kittens grew, they became such a close knit family that you would rarely find one kitten without its brothers and sisters close by.



We are fortunate enough to live in rural England; in the beautiful countryside, next to the village church where I am the volunteer Church Warden. Also next to the house is a green field where sheep and lambs nibble grass and we can see our neighbour's two horses grazing happily. A blue wooden gate leads from our garden into the field and I often go out and check that the sheep and the horses are all ok; sheep sometimes lay down and get stuck, or cast as it's called, and if someone doesn't turn them over and lift them up onto their feet, their stomach's swell up with gas and they have to be humanely destroyed.

From the time they reached approximately six months of age I found that all four of the kittens would follow me out and into the field as I shepherded the sheep, often running in slightly different directions, but always broadly following my lead. This then is where the title of the White Paper came from; unlike sheep, cattle or horses, we cannot herd cats. However, we can learn to lead them so that they choose to follow. Rather like volunteers.

## **2. Acknowledgements, Thanks and Dedication**

Like all significant projects, this project could not have been achieved by one person alone. I am hugely indebted to all of the volunteers and volunteer managers who so generously gave their time, knowledge and experience to the project. Without their openness and insights this White Paper would have looked very different. Grateful thanks too are due in particular to those people in the following organisations with whom I was able to work so closely: Her Majesty's Coastguard, the Royal Naval Lifeboat Institution, (RNLI), the National Trust and the British Psychological Society. In the research for this project I also interviewed volunteers from the National Federation of Children's Book Groups; the Red Cross; the Church of England; South Devon Railways; the UK Police Service and various school support groups and sports clubs. My grateful thanks to you all.

This White Paper is dedicated to the brave men and women of Her Majesty's Coastguard and the RNLI. Volunteers who make themselves available 24 hours a day, 365 days a year, and who risk their own lives to save those of strangers, on more than 23,000 miles of the UK coastline and in the coastal waters of the UK. Without their dedication, commitment and generosity of spirit, many more lives would be lost.

### 3. What are the Problems and Issues within Volunteering?

The research I conducted was extensive and identified a number of common problems and issues within organisations which use or rely on volunteers to achieve their objectives. In order to have the whole picture, we need to consider these in conjunction with the Volunteer Lifecycle and what we know to be best practice into the effective leadership and management of volunteers. Broadly, the issues and problems are:

- A chronic shortage of volunteers and an aging volunteer population.
- Organisations are often desperate for volunteers. This perpetuates the thinking that anyone will do! It's not true of course and causes performance issues later on.
- Poor recruitment practices for volunteers are very common.
- There is often conflict between paid staff and volunteers.
- Volunteers often don't behave 'professionally', (because they are not professionals).
- Some volunteers don't want to be actively 'managed', whereas other volunteers want to be micro-managed.
- Frequent 'politics', cliques, in-fighting and falling-out between volunteers.
- Some volunteers have very low self-awareness which causes inter-relationship issues with other colleagues and with their management.
- Frequent non-performance issues regarding volunteers.
- Volunteers are often made to feel like 2<sup>nd</sup> class citizens compared to paid staff.
- The difficulty of 'sacking' volunteers who are not employees.
- The majority of Volunteer Managers receive no training in how to lead or manage volunteers effectively and therefore they do it badly. The same is true of informal, supervisory volunteer managers who are sometimes also volunteers themselves.
- Paid staff are not trained how to work effectively with volunteers either.
- Incidents of volunteers being 'bullied' by their supervisors or managers.
- A chronic lack of resources, particularly for the smaller organisations.
- Whilst individual organisations will often happily collaborate with each other, there is no one hub, portal or institution to co-ordinate information and share resources regarding volunteering and volunteer management. This is surprising given the size of the sector and the obvious need which both individuals and organisations have for information, support and training.

#### 4. Why People Volunteer

The literature surrounding volunteers, volunteering and volunteer management is vast and it's global. Volunteers are the backbone of many different organisations, all of which rely on their volunteers to achieve their stated purpose and objectives, and all of which would fail if their volunteers were to universally withdraw their support. It's difficult to define volunteering however, as there is no standard person who volunteers and no standard practice in volunteering. Verduzco<sup>1</sup>, defines volunteering as, *“unpaid help given to another person not a member of one's family”*, while Snyder and Omoto<sup>2</sup>, define volunteer work as, *“freely chosen and deliberate helping activities that extend over time, are engaged in without expectation of reward or other compensation ..... and that are performed on behalf of causes or individuals who desire assistance.”*

Charles Handy, in his 1988 book, *Understanding Voluntary Organisations*<sup>3</sup>, suggests that there are three kinds of voluntary organisations: the first is one of mutual support, where people with shared interests and enthusiasms work together to achieve mutual goals and objectives. The second kind of voluntary organisation is focused around service delivery. These organisations are often organised around formal, professional lines with a commercial interest running in parallel with their charitable objectives. The third kind of voluntary organisation is, Handy suggests, focused around purpose and is campaign or cause specific.

- i. Mutual Support
- ii. Service Delivery
- iii. Campaign or Cause Specific

However, unfortunately, neither understanding the different categories of voluntary organisation nor defining volunteering bring us any nearer towards understanding why people volunteer in the first place. A theoretical model by Clary and Snyder<sup>4</sup>, published in 1999 may help us shed some light on it. They identified six motivational reasons, personal or social, why they think that people volunteer, although their model has been criticised by some writers as lacking developmental rigour<sup>5-6</sup>. Their Volunteer Functions Inventory, (the VFI), has provided a useful framework within volunteering which some charitable organisations such as the National Trust and the RNLI have been able to use in their recruitment and marketing campaigns to motivate people either to volunteer, or to donate funds. These being the two things which are universally identified within the volunteering literature as being the most challenging aspects for the voluntary and charity sectors.

In summary, the six motivational reasons why people volunteer are:

- |               |                  |
|---------------|------------------|
| 1. Values     | 2. Understanding |
| 3. Career     | 4. Enhancement   |
| 5. Protection | 6. Social        |

- 1. Values.** Many organisations, charitable and otherwise, are values driven or values led. Religious volunteering, humanitarian projects or any pro-social event invariably needs to be supported by unpaid people whether that's soup kitchens for the homeless and hungry, 'meals on wheels' pensioner lunches, sports events, choirs, jumble sales, book clubs, and also in the UK, library services, the police and the fire service. Helping others and living one's values are usually the personal and social motivating factors here.
- 2. Understanding.** This could also usefully be called *learning* or *skills development*. This is a personal motivating factor whereby the volunteer is able to learn new skills, develop or practise existing ones, or understand more about society and the world, in ways which are personally beneficial for them.
- 3. Career.** Similar to Understanding, this is another personally motivating factor. Here, the volunteer engages in career-related activities which current or future employers could find desirable. These can be knowledge based, skills based or values based. Many organisations like to see evidence of volunteering on people's CVs, as this suggests a pro-social orientation which may correlate with kindness, generosity of spirit, a collaborative approach and good team working.
- 4. Enhancement.** From a psychological perspective, volunteering can make people feel better about themselves and their role or place in the world, particularly if they are psychologically vulnerable or emotionally fragile. This is another personally motivating factor and it may enhance someone's self-esteem and personal feelings of self-worth.
- 5. Protection.** Similar to Enhancement, this motivational factor is also psychological in nature. Someone may use volunteering to protect themselves from negative feelings, such as guilt, social embarrassment, or low self-esteem. Helping others also shields us from having to focus on our own personal or professional problems, as our thoughts, emotions and focus are, for the period of time that we are volunteering, elsewhere.
- 6. Social.** This motivational factor is both personal and social. Sharing an interest, values or a passion about something can increase both the number and strength of our friendships and other social relationships, making us feel better about ourselves and reducing personal anxiety or negative feelings. Like Values, this factor also relates to *Social Identity Theory* which is explored later on in this paper.

As you will have noticed, these six functional motivations are not mutually exclusive; it's quite likely that someone will be motivated to volunteer by more than one of them at any particular time in their lives. If you want to use the Volunteer Functional Inventory, (VFI), framework to recruit, lead and manage your volunteers more effectively, you will find that it's freely available on the internet.

The VFI suggests the motivational factors involved regarding why people volunteer, however it doesn't help us to understand why some people *don't* volunteer. The most common reasons given in the literature for not volunteering include a lack of resources such as time, and needing to earn money rather than engage in activities which do not earn revenue<sup>7-8</sup>. I would also add that, in my experience, many people don't know how or where to volunteer to support projects or issues which interest them. Also, some people are not particularly pro-social or others-oriented, and are therefore not interested in giving up their personal leisure time to help other people who are not close friends or family members.

Whilst the VFI suggests the reasons why people volunteer in the first place, it doesn't help us to understand which kind of roles people like to undertake once they are a part of the organisation. Remember that often, volunteers will be working alongside paid employees, and also, now equally as common, that volunteers may be led and managed by someone who is themselves, a volunteer. Therefore understanding more about people's role preferences can be useful in terms of *role fit*. This assists in getting the best out of each volunteer, managing their expectations, role succession planning and motivating people to continue volunteering and supporting the organisation in the longer term.

In a series of interviews with young adult Finnish student volunteers, Grönlund<sup>9</sup>, identified five different role preferences: the influencer, the helper, the faith-based volunteer, the community-based volunteer and the success-based volunteer. Once again, like the VFI, these categories are not mutually exclusive and so someone may have a preference for more than one role. These role preferences may be so important in the lives of a volunteer that they become part of the person's very *identity*. No questionnaire exists for this, but if you ask someone, they will tell you which one motivates them the most.

The five role preferences are:

1. The Influencer
2. The Helper
3. The Faith-Based Volunteer
4. The Community-Based Volunteer
5. The Success-Based Volunteer



### **The 5 Role Preferences:**

1. **The Influencer.** These people want to use their influence to make the world a better place. They may be non-conformist, challenging, and driven by purpose. These people are often quite feisty and they will fight to make a difference in some way.
2. **The Helper.** Bringing comfort, these people are driven to assist others. They are kind, compassionate, benevolent, understanding, nurturing, generous of spirit, supportive, collaborative and always there when they are needed.
3. **The Faith-Based Volunteer.** Also driven by purpose, these people volunteer to express their religiosity and faith. They often feel that they have a religious calling to volunteer and that their volunteering role is a way for them to bear witness to their faith.
4. **The Community-Based Volunteer.** Without so many people fulfilling community-based volunteering roles on behalf of the society groups they live within, potentially, society would collapse. Being a good citizen may be one of the motivations here, linking to the ancient Greek philosophy of deontological, society-based ethics. Political civic duty and municipal service are examples, as are HM Coastguard, the police, the fire service and the RNLI. Very often, the focus of this role is broader in that as well as helping *individuals*, the volunteer wants to assist in building a sustainable community future. Therefore this role is also performed at a *group* level.
5. **The Success-Based Volunteer.** Like the Influencer role, this volunteer likes to occupy a position of trust, to make a difference and take responsibility for things; driving decisions and actions through. They will use their knowledge, skills and talents to make their volunteering projects successful thereby making themselves feel successful in their own ways and also perceived as being successful in the eyes of others.

### **Role Preference Implications for Leadership**

Any of these role preferences may result in a volunteer seeking out or taking on a leadership and management position within an organisation. It's worth noting however that the Influencer and the Success-based roles are probably the most task and action oriented and therefore the most directive of others. They are also more individualistic and lend themselves more to decision-making. Therefore these two roles are likely to be perceived as leadership roles more than the other three roles are, and those people who have a preference for them, are more likely to embrace or even seek out management or leadership responsibility.

## 5. The Volunteer Lifecycle.

There are a number of variations on the lifecycle of volunteering<sup>10-12</sup>. For usefulness and ease of understanding however I have synthesised them into a simple 3-stage process: Managing Volunteers In, Managing Volunteers While They Are In, and Managing Volunteers Out. This lifecycle model is expanded upon below to include those elements which I believe are the most crucial to the effective leadership and management of volunteers at each stage of the process.



The Volunteer Lifecycle model is expanded upon and each of the elements are explained more fully in Appendix 1. Interestingly, we could argue that this is also a very effective *employee management* system, with elements such as performance and financial management and succession planning also implicit within the framework.

## 6. The Psychological Contract and the role of Trust

Even though the literature surrounding volunteering is vast, it seems to have neglected the area of contracts; assuming that because volunteers are generally unpaid, contracts are irrelevant! Actually this is far from the case as I will explain. Firstly however we need to explore the different kinds of contracts which exist. To do that, I need to borrow from the human resources and employee literature, as that's all there is to describe it; there isn't specific volunteering terminology which we can use.

The *traditional employment contract* is taken from *economic exchange theory*; it's *transactional* in nature, meaning it involves ideas such as, "A fair day's work for a fair day's pay"<sup>13</sup>. Transactional contracts are formal, based on financial reward, and explicit in that they are written down and specific. They are usually legally binding and therefore legally enforceable in a Court of Law, they are time specific in that they have a stated beginning and end, and they often contain punishment clauses such as dismissal clauses for a breach of the contract. They are *professional and impersonal* and they are also *cognitive and intellectual* rather than concerning feelings or emotions.

In contrast, a *relational* contract is the opposite of a transactional contract. Emerging from *social exchange* perspectives<sup>14</sup>, it's a psychological concept based on emotions, feelings, expectations, understandings, beliefs, experience, needs and wants. Relational contracts are broadly known as the *psychological contract* and they are intensely *personal*. Some of the elements of the psychological contract may be expressed and made explicit, however mostly these relational elements are not expressed but rather they are unsaid, which of course makes them potentially complex and problematic. The psychological contract is now becoming recognised as being critical to the relationships between people, and also to the relationship between people and organisations.

The psychological contract is *affective*, that is, it's emotionally based rather than intellectually based. A manager who promises to call you back and doesn't, has broken the psychological contract between you. A colleague who takes someone else's food from the communal fridge has also broken the psychological contract between themselves and their colleagues. A manager or leader who lies, or who doesn't fight for the training and development opportunities they promised you, has also broken the psychological contract they have between you. Any and every breach is experienced emotionally and results in a lack of trust between the people involved. This *concept of breach* is considered to be the most important idea in psychological contract theory<sup>15</sup>.

Arguably, the psychological contract is more important than the transactional contract because it fundamentally effects and affects the relationships between people and the organisation. As a trained commercial mediator, every employee or volunteer grievance I encounter invariably involves a breakdown in the relationship between people which can be traced back to a breach of the psychological contract. Any breach of an element of the psychological contract will result in a *breach of trust* between the parties. Managers and leaders who are trusted by their staff, (whether they are employees or volunteers), by definition, don't breach the psychological contract.

One of the most significant outcomes of an *Authentic Leadership style* is trust. So could Authentic Leadership perhaps be the most appropriate leadership style for those people who have responsibility for the leadership and management of volunteers? This is something which I explore further in Section Eight, Leading and Managing Volunteers.

Whilst every paid employee has both a written, formal, *legal* contract of employment and also, (whether they are aware of it or not), an informal, unwritten, *psychological* contract with their remunerating organisation, most volunteers only have an unwritten, psychological contract. This means of course, as awareness of the psychological contract is very low, that most volunteers don't realise that they have a contract at all!

All UK organisations do have a *Duty of Care* to their volunteers however, just as they do to their employees. Some of the elements of their duty of care will be formal, such as staff insurance cover in the event of an accident, and professional liability indemnity cover in case a member of personnel inadvertently causes an accident! Other elements of the duty of care will be physical, such as ensuring a safe and risk-assessed working environment regarding heating, lighting and noise, some will be psychological, such as the provision of appropriate supervisory support in the completion of assigned tasks and responsibilities. Many of these duty of care elements are recognised by the law as reasonable expectations for *all* members of staff; paid or unpaid, and therefore the wise organisation treats their volunteers with respect and consideration. After all, as a volunteer, someone can withdraw their support at any time, for any reason, and with no notice.

There is also a third kind of contract, one which is completely ignored within both the employment and volunteer literature. This is surprising, given its importance and the implications that it has for practice and organisational efficiency and success.

I call it a *mixed contract*, and it's only relevant to a certain kind of volunteer organisation. These organisations are usually *Service focused* and also have part or full-time employees doing the same or similar job roles to the volunteers. These organisations *partially remunerate their volunteers* for some of the hours that they work and/or some of the activities that they undertake, but not all of them. Her Majesty's Coastguard is one such organisation, so too is the Royal Naval Lifeboat Institution, (RNLI), with regard to their sea-going lifeboat crews, as is the UK's retained Fire Service. The RNLI is a charity, whereas the Fire Service and the Coastal Rescue Service sit under the remit of the UK Government. All three organisations rely on volunteers to save lives within the community, and therefore risk management, safety protocols and the accurate recording of everything that they do, is critical to their operational capability, performance and ultimately, accountability.

Mixed contracts are a combination of inter-woven transactional and relational elements. They are complicated, because volunteers have a legally binding contract, albeit not one of employment, but rather one of terms and conditions. With these three organisations specifically, the reason for the terms and conditions contract is safety-related. Volunteers can be dismissed, even though they are not employed, and they can also be disciplined. They are not called employees and yet they are 'paid', often by way of a call-out or shift allowance, compensation for lost earnings, and a nominal fee for some, but not all, training hours. Interestingly, whilst the volunteers may consider themselves to be volunteers, in the UK, Her Majesty's Inland Revenue Service view all income from their volunteering activities as taxable income and their positions as one of paid employment; further muddying the waters of already complicated contract law.

## **7. Employees; Volunteers; People: What we know about getting it right.**

There is very little within the volunteering literature about how to lead and manage volunteers effectively, and so we need to look at the employee and leadership fields instead where there's a wealth of available information, knowledge and evidence-based practice. From a human resources management, (HRM), perspective, we actually know quite a lot about good leadership and good people management and how to get it right.

Unfortunately though, for some strange reason, whilst there may be individual leaders and managers who are excellent, very few organisations get it right across the board. This is true of *all* organisations, whether they are private sector, public sector, educational institutions, retail, the charity sector or any other kind of organisation. So within this section I'm not going to differentiate between employees and volunteers. My personal beliefs and my values suggest that we should be treating everyone well; regardless of whether we are paying them or not! After all, they are all people, they all have feelings and deserve our respect, and they each have a critical role to play within our organisations.

I have come to believe that there shouldn't be any kind of a divide or difference between volunteers and paid staff within an organisation. If there is, it's poor leadership and bad management. If there is a difference, then it's a cultural issue and is something which has been 'allowed' to happen. Setting the culture of the organisation is the responsibility of the senior leadership team, and very often the organisational culture will be a reflection of *their* personal beliefs and values. It only takes one poor leader to set a poor example to the rest of the organisation, and one incident of poor behaviour which goes unchallenged, for the cycle of poor leadership and management to begin, and worse than that, to be subsequently copied by others and thereby perpetuated.

Unfortunately, and it's all too common, (I have heard it myself), as soon as one person thinks, or worse, says, "*Oh well, they're only a volunteer, they don't matter*", the death bell is already beginning to sound for an organisation. This is because it shows a fundamental lack of respect, and a fundamental lack of appreciation, for the very people who are giving their valuable time, energy, commitment, effort and attention free of charge to an organisation which frankly, doesn't deserve their loyalty. In the course of my research into how to lead and manage volunteers well, I came across some shocking examples of individuals and organisations that are doing it badly. This is completely unnecessary. If organisations want to survive, or even better, to thrive, they must learn how to engage, lead and manage *all* of their staff, and especially their volunteers.

In the course of my research I identified two organisations which stand head and shoulders above the others in terms of the ways they lead, support and manage their volunteers. They are The National Trust and The RNLI. Interestingly, they both share the following characteristics:

- A strong culture and sense of pride in the Purpose and achievements of the organisation.
- Seamless integration between volunteers and paid staff.
- They are very visual, have clear branding, a clear purpose and 'clever' marketing, in that they understand and utilise the VFI and the volunteer role preferences.
- They make very effective use of language to engage, inspire and reward.
- They understand the psychological contract and do not breach it.
- They have a long-term strategic plan which is operationalised.
- They engage and motivate all of their staff effectively, including volunteers.
- They 'performance manage' all of their staff effectively, including volunteers.
- They have an effective and easily navigable website which links to the VFI.
- They will always find a role for a volunteer, and everyone feels valued.
- There are clear lines of communication, and organisational strategy and achievements are regularly shared in ways which involve everyone.
- They celebrate successes. They also identify individuals, paid or unpaid, who have done something outstanding and publicly recognise their achievements.
- They have one senior level person who has a clear responsibility for volunteer management. This is a clearly defined and well-respected role, not simply an 'add-on' to their other role/s within the organisation. Not only are they easily identifiable and contactable, they are genuinely caring and champion the volunteers both within the organisation and outside of it. They are great at what they do and they are very proud to do it.

Perhaps you would like to use the above bullet points as a quick benchmarking checklist? Re-read each item carefully giving your organisation a tick if they do it well or a cross if they do it badly. If your organisation does it partially well, mark the bullet point with a ½. This will enable you to see very quickly, at a glance, what the situation in your organisation might be, and it will give you some clues as to which issues might need addressing as a priority.

## 8. Volunteer Satisfaction.

Comparatively little is written about volunteer satisfaction, although there is a Volunteer Satisfaction Index<sup>16</sup>, (VSI). The researchers used the available literature at the time to develop a 4-factor model designed to measure volunteer job satisfaction. It comprises: organizational support, participation efficacy, empowerment, and group integration. Taken together they are very powerful motivators. This is particularly because they also link directly with the *psychological contract* between the volunteer and the organisation and the volunteer and their supervisor, and the concept of *breach*.

If any one of these four things is missing for a volunteer, potentially, that will be enough for them to withdraw their support and leave, although they may begin volunteering for another organisation depending on what motivates them to volunteer in the first place.

1. **Organisational Support.** When volunteers feel valued and supported by their organisation they are happier. Training volunteers to fulfil their roles and subsequently trusting them to do their jobs are critical here, as is the provision of emotionally supportive supervision, flexible working hours and consideration towards providing a satisfying experience for volunteers within the organisation.
2. **Participation Efficacy.** This could also be called *Effectiveness or Usefulness*. Volunteers need to feel that the voluntary work they are involved in is useful and benefits others; in other words, that they can make a difference somehow by what they do. If volunteers don't feel that the things they participate in actually add value or are effective, they are likely to become demotivated and may leave the organisation to volunteer elsewhere.
3. **Empowerment.** *"The volunteer should not have to waste precious time . . . arguing with officials about what to do and how to do it<sup>17</sup>".* Empowering volunteers involves trusting them; they need to feel able and *enabled* to complete the roles and tasks which have been asked of them. Volunteers can quickly become demotivated and will be much more likely to withdraw their support or even leave if their decisions are overturned, if they are told off, if they feel punished in any way or if they feel dis-empowered or under-valued.
4. **Group Integration.** This relates to group dynamics and is independent of the roles and tasks assigned to a volunteer. Group integration is all about relationships; feeling like a part of the team, having friendships within the working group and within the organisation, being liked and liking the other people, (regardless of whether they are also volunteers or are paid staff). Being missed if you are not there, spending time socially with the other members of the group, being invited to and attending group social events and being valued as a person as well as being valued and appreciated for what you can do as a volunteer.



Training volunteers properly to do a good job and trusting them to do it. As a manager, being trusted by the volunteers to lead and manage them effectively. Valuing volunteers individually for their unique contributions. Supporting them, encouraging strong friendships, understanding work-based and social relationships and the importance of the psychological contract are, in my personal opinion, the most important factors in volunteer satisfaction and motivation. Unsurprisingly, they are also the elements which motivate paid employees! Predictably, where these elements are absent, both paid employees and volunteers quickly become demotivated which can lead to either a formal withdrawal of support when they resign and leave, or informal withdrawals such as a reduction in effort or emotional commitment, less engagement and a generally less positive attitude.

### **Volunteer Engagement Surveys.**

These are a great idea and can give you valuable feedback, provided that you implement them effectively by following the guidelines set out below. They are particularly powerful when they can be integrated with a parallel employee engagement survey which asks similar questions. This way the feedback from employees and volunteers can be compared.

1. Invite everyone to participate and offer confidentiality. Some people will want anonymity, other people will waive it of their own accord.
2. Design and ask questions which are meaningful for volunteers specifically. Don't simply use an employee engagement survey and think that will do. It won't!
3. Offer telephone and face-to-face discussions as well as simply the questionnaire. Group feedback is very useful and offers an opportunity for groups to bond.
4. Give people a real person to contact if they want to. It will increase your participation %. Anything over 30% is good! They are volunteers remember, not employees, - you can't make them do anything they don't really want to!
5. Thank people for their participation and reiterate confidentiality. Let them know the timescales for the collation of results, the communication of feedback and any changes which may happen as a result of their feedback.
6. Be authentic. If things are difficult or you don't know the answers, say so. If you need help, ask for it. It will increase trust and shows you are only human!
7. Do something useful with the results! Make some changes to policies and procedures if necessary and feed back to volunteers regarding what *is going to* change, and later on, what *has* changed, as a result of their feedback. To ask the questions and then do nothing about the answers is a powerful *demotivator*, and it also *breaches* the psychological contract as you have set up expectations for change.
8. Learn about change management, within which *communication* is critical. Your senior team will probably have had six months to get used to any proposed changes, so don't simply expect the rest of the organisation to accept them overnight!

## 9. Leading and Managing Volunteers Effectively

Good supervision, leadership and management isn't rocket science, which is why it's such a surprise to me that so many people get it so badly wrong and so many organisations not only allow it, but actually encourage it via their internal systems and processes. The following bullet points detail the behaviours you will need as *a starting point* to lead and manage volunteers effectively. You will also need to pay careful attention to every element of the Volunteer Lifecycle, as this is not a comprehensive list!

- Be fair, be firm, be kind, be respectful, be generous, be considerate.
- Be grateful and remember to thank people often.
- Have a variety of tasks, roles and opportunities to become involved.
- Be clear about performance expectations and hold people to them.
- Lead and manage them effectively using all elements of the Volunteer Lifecycle.
- Manage people *individually*; i.e. *in their preferred ways* which motivate *them*.
- Don't take advantage of people's goodwill.
- Don't allow divisions between 'paid and unpaid'; staff vs. volunteers
- Give something back, (if you can), and provide free refreshments.
- Encourage social interactions and team building.
- Use Social Identity Theory to create pride and cohesion.
- Make your Volunteer Managers a priority and train them properly.
- Celebrate success internally and externally, publically and privately.
- Have branded clothes and kit, (links to Social Identity Theory).
- Check in with them regularly to make sure they're ok.
- Listen to them if they're not ok and do something about it!
- Encourage pride in the organisation and its Purpose or Mission.
- Make it easy to claim back out-of-pocket expenses and pay them promptly.
- Get the logic and process right of effective project management.
- Expect people to perform and follow up if they don't.
- Understand the criticality of the Psychological Contract and don't breach it.
- Remember that nothing builds a cohesive team like a successful project.
- Train *everyone* who has a responsibility for volunteers, to lead and manage them effectively. (This is one of the goals of The National Trust, by 2020)

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#### **Further Information:**

The New Alchemy: How Volunteering turns donations of time and talent into human gold. <http://e-nfpsynergy.net/6BS-3A7JY-ACJ7FZXG22/cr.aspx> This is a wonderful report and an excellent free resource. It's thoughtful and well written by Saxton, Harrison and Guild. It was published in March 2015.

## 11. About The Author

Dr Fiona Beddoes-Jones is a Chartered Psychologist and leadership development specialist. She is passionate about helping individuals, teams and organisations achieve their potential and has a special interest in volunteer management as she spends 30% of her time volunteering on pro-bono projects. Her doctoral research is in the area of Authentic Leadership, and working with senior officers in the RAF, she developed the UK's only Authentic Leadership 360<sup>0</sup> Questionnaire. She regularly speaks at International conferences on the subject of Leadership and related things.

Dr Beddoes-Jones is the Race Psychologist for the annual ultra-marathon, the Spine Race, and Expedition Psychologist for the Ice Warrior Project; a citizen-science endeavour to reach the last unexplored North Pole and measure the rapidly melting Arctic sea ice.

### Books:

Divided by Gender, United by Chocolate: Differences in The Boardroom.

Love is The Answer. (Which includes Loving and Leadership - The Corporate Love Model).

Thinking Styles – Relationship Strategies That Work!

### Psychometric Instruments:

Leadership Temperament Types™

Authentic Leadership 360™

Thinking Styles™

Cognitive Team Roles™

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### About The Cognitive Fitness Consultancy.

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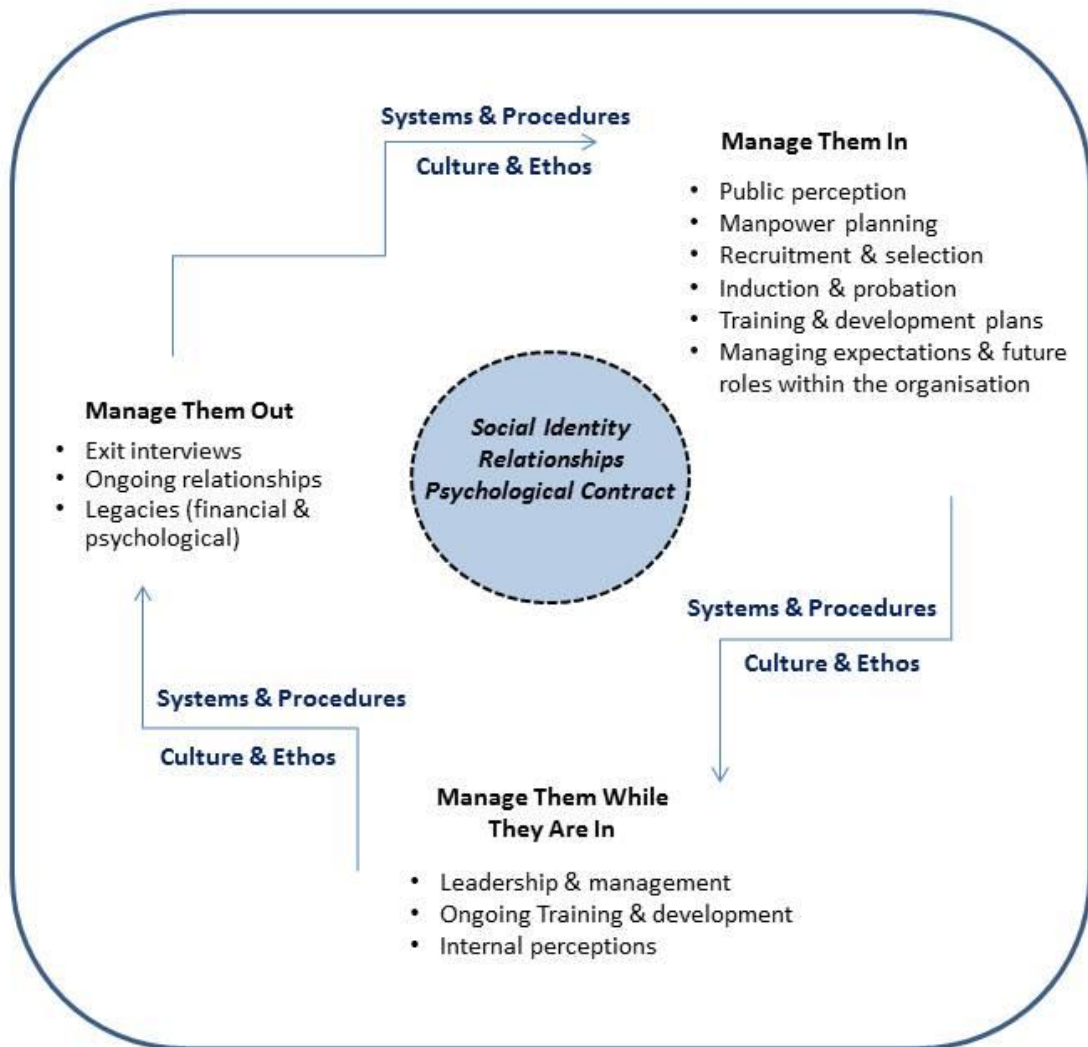
Using the Authentic Leadership 360<sup>0</sup> Questionnaire.

More information on all of these things and a library of freely downloadable resources is available from the Cognitive Fitness website at [www.cognitivefitness.co.uk](http://www.cognitivefitness.co.uk)

## Appendix 1 - The Volunteer Lifecycle

This Appendix is designed to take you through the different parts of the Volunteer Lifecycle, explaining each element of it in a way which is easy to understand and apply to your organisation and the volunteers you manage.

You will notice as you read through it that some of the language is taken from Human Resources and the employment paradigm, e.g. induction, and manpower planning. However, it's the correct terminology to use in its place and there isn't a valid volunteer alternative!



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## Appendix 2 - The Volunteer Lifecycle, (continued).

You will notice that between all three elements of the Lifecycle model I have written *Systems & Procedures, Culture & Ethos*. These are the things which surround an organisation; in a way, the organisation sits within them and they are the critical elements which unite all of the parts of an organisation and which should be the same for everyone in it regardless of whether they are paid staff or volunteers. The systems and procedures will usually be formalised and contractually legally binding, whereas the culture and ethos, whilst including the espoused *values* of an organisation, are usually informal, not legally binding and are very rarely explicitly identified or written down.

You will also notice that in the centre of the Lifecycle model I have written *Social Identity, Relationships & the Psychological Contract*. These are the things which are absolutely at the heart of any organisation or group and they are the things which people's day-to-day lives are built around as they are *all to do with people's feelings* about the organisation. They are *intensely personal* and everyone will experience them slightly differently, which of course makes managing them very complex and therefore potentially problematic.

*Social Identity Theory*, (Tajfel & Turner, 1979), is a person's sense of who they are based on their group memberships and affiliations. It includes how people identify with their family and friends; hobbies and interest groups; their preferred organisations' purpose, goals, objectives and values, whether that's where they work or where they choose to shop. Social identity encompasses a sense of belonging and a sense of pride, meaning and self-esteem, and how people define themselves in terms of group membership. Using the terms *I* or *we* often denotes something to do with social identity.

*The psychological contract*, previously explored here in section 5, concerns promises, expectations and mutual obligations between two or more parties. These parties may be two people, or they may be a person, (volunteer or employee), and their organisation. The specific elements of the psychological contract will be unique to each relationship. What will be similar however is that these expectations, beliefs, the degree of mutuality etc. will rarely be written down and made explicit, but are most often informal and intangible. Not only is managing the psychological contract extremely complex, I would argue that it's *even more important to get right* as the consequence of any *breaches* of the psychological contract is always that *trust is broken, and relationships therefore suffer as a result*.

## Managing Volunteers In.

- **Public Perception.** As one of the most difficult things seems to be getting people to volunteer in the first place, the public perception of your organisation is critical and you need to manage it effectively. If you don't, you will find that recruiting volunteers to help you becomes problematic. If your supply of volunteers dries up, eventually you will find yourself in serious difficulties; and you may find that your organisation eventually ceases to exist. Amongst other things, the public will use the following things to judge your organisation and whether they might want to volunteer for it: the quality of your website and how easy or difficult it is to find useful and relevant information and navigate their way around it; your branding and all of your marketing materials; the visual images and the words you use in your literature; your media presence and profile; and stories they hear about your organisation and the people within it, (paid or unpaid staff); the way your staff and volunteers speak to them and interact with them; plus anything that they may hear 'on the grapevine', especially from any family of friends who already volunteer for you.
- **Manpower Planning.** Whilst all professional organisations do this, as do all of the *commercial* charities, (which need revenues in order to survive and which will have paid staff working alongside volunteers), for example the Red Cross, Water Aid and the National Trust, strangely, very few of the smaller voluntary organisations do this, or at best, they only do it informally. The *process* of manpower planning is to think about your long-term, strategic objectives, and what you want to achieve, (most often for the next 12 months or more). Then, break that down into a shorter-term, operational plan, so you know what exactly the organisation needs to achieve over the coming months, and therefore how many people, (volunteers and paid staff), you will need. Sometimes, it's useful to think about full-time equivalents, (FTEs), rather than people, so x1 FTE working an 8-hour day, might equate to 2 part-time staff working 4-hours each, or 8 volunteers offering their services for an hour each for example. The specifics of manpower planning will vary depending on your organisation and how it's structured.
- **Recruitment and Selection Processes and Procedures.** Apart from getting financial donations, recruiting volunteers is recognised as being one of the most difficult things to do within the volunteering context. Along with public perception, this stage of the lifecycle is the most critical in terms of making sure that you *recruit the right people* into the organisation. I have heard many volunteer managers say that they just need someone to fulfil a role, sit on a committee, work in a shop, take money on a door or a million other volunteer tasks which need to be done. This thinking is, in my opinion, fundamentally flawed! I strongly believe that it's critical to have the right person in a role or responsible for a task, because *the wrong person can cause so much damage within an organisation!* They can perform the role or task poorly; upset people;

demotivate others and cost the organisation or group dearly in terms of external, (public), perceptions as well as damaging the internal culture and sense of group cohesion. 'Clever' organisations use the six reasons why volunteers give their time and energy for nothing, (the VFI), to recruit volunteers. They then also use these reasons to manage their volunteers' expectations once they are a part of the organisation.

- **Induction and Probation Processes.** It's not enough just to get a body through the door! How your organisation treats a volunteer when they join is absolutely critical to the volunteering experience. This sounds obvious, but you would be amazed at how many volunteers just seem to be ignored once they've joined! *Which of course, immediately breaches their psychological contract, as their expectation will be that they are 'looked after' when they join.* Every member of staff, paid or unpaid, should be introduced to the organisation and the people within it effectively. They need to understand formal and informal processes and procedures; 'how things are done around here', which out-of-pocket expenses they can claim for and how to do that; who to speak with if they have a query or a problem, where they are expected to park, the hours they expected to work, etc. The most successful organisations all have a probationary period, often of 3 months, for all personnel; including volunteers. The National Trust does this. They really want to know whether there is a good fit between the organisation and the volunteer; how the volunteer gets on with the other members of staff; are they fitting in?; are they reliable, committed and trustworthy?; do they complete the tasks assigned to them or do they leave jobs half-done? etc. Without a probationary period built into the recruitment and selection and induction process, how are you going to let someone go/manage them out of the organisation if they are disruptive, difficult, don't fulfil their role, don't fit in? etc.
- **Training and Development Plans.** If you want someone to be effective in their role, it seems obvious to suggest that you should train them to do it properly! Once again, you would be amazed at how many voluntary organisations don't seem to realise this! Or, they offer training and development, but it's poorly delivered, or it's not available for 6 months! Volunteers who are not trained or developed are less satisfied and happy in their roles, (and therefore more likely to leave), than those people who feel supported by a training and development plan, even if their training and development plan is informal rather than formalised.
- **Managing Expectations and Future Roles Within the Organisation.** Again, this is most likely to be done informally and be a part of the psychological contract than it is to be done formally. The very best volunteer organizations; such as the National Trust and the RNLI, do it formally for every individual volunteer, and it therefore becomes part of the organization's *succession planning*.

### Managing Volunteers While They Are In.

- **Leadership & Management.** Leading and managing volunteers effectively is obviously the purpose of this white paper and the whole of section 8 is dedicated to it. Suffice to say here that if you want your organisation to succeed, and the people within it to be successful, then you need to lead them and manage them effectively. If you don't, they will leave, and that applies to paid staff as well as to volunteers.
- **Ongoing Training & Development.** This is the same principle as the training and development plans in the previous section. Most volunteers value ongoing training and development to assist them in fulfilling their roles and they will often feel aggrieved if they do not receive it. Not every volunteer wants to be trained and developed however! Some volunteers feel that training and development links too much to formalised working environments and links to performance management, which some volunteers object to, (Rochester, 2006). There are a number of ways of organising ongoing training and development. For example: individual development plans dependent on someone's specific needs; group training for everyone in a specific category such as group induction for volunteers who started at the same time, and role or task development where the training that's required is dependent on the role or task that someone is undertaking, such as technical rope training for Coastal Rescue Officers who are going to become involved in cliff rescues.
- **Internal Perceptions.** It's not unusual for internal and external perceptions to be slightly different as volunteers learn more about the organisation from the inside. Ideally, because perceptions are closely linked to the expectations which volunteers form about the organisation, the internal perceptions which the volunteer develops, will be consistent with, or even more positive, than the external, public perceptions of the organisation, which naturally enough may have influenced their decision to join the organisation in the first place. Where the thoughts and feelings about the organisation *from the inside*, from internal staff and volunteers, are poor, then volunteer and staff engagement is also likely to be poor, and turnover is likely to be higher.

### Managing Volunteers Out.

- **Exit Interviews.** Volunteers leave an organisation for a variety of reasons, (see Section 7 regarding Volunteer Satisfaction). It's really valuable to find out why people want to leave as there may be patterns which emerge. Identifying patterns, trigger points, sources of dissatisfaction or even specific individuals who significantly upset people, is vital if you are going to do something about it and try to minimise turnover and volunteer losses.



- **Ongoing Relationships.** Once a volunteer has left an organisation, then what? Just because someone is no longer volunteering, that doesn't mean that their relationship with the organisation is necessarily over. Especially for older volunteers who have retired, it can be important to their sense of social identity that they continue to be associated with the organisation in some way. This will also be true of the friendships that a volunteer has developed within the organisation; relationships are important and should be nurtured, encouraged and supported by the organisation as part of the *duty of care* that the organisation has to all of its volunteers, current, previous and future.
- **Legacies, (financial & psychological).** Some volunteers may want to leave a financial legacy to support an organisation they have volunteered for, either as a donation whilst they are still living, or as a legacy in their will. Other people may want to leave a psychological legacy which recognises their contribution, their value and the difference that they made to the organisation. Often, in the case of a long-serving retiree, the organisation will recognise the volunteer in a book, on a plaque, within the annual report, or with a service medal or something similar. However, thanks, recognition and the leaving of a legacy is also just as important to those people who have volunteered for a short period of time as it may be to those people who have left the organisation because they were unhappy. How an organisation treats its *leavers* is critical as their feelings and comments feed in to the internal and external perceptions of the organisation and of course, also form part of the psychological contract and duty of care that the organisation has to its staff, both paid and unpaid.

**Appendix 2 – A Checklist for Leading and Managing Volunteers.**

You may use this freely within your organisation as a quick checklist to identify how well led and managed a volunteer feels. Be aware that they may choose to remain anonymous. The roles of supervisor, manager, line manager, group or team leader are all used synonymously as organisations have different structures for leading and managing their volunteers. Remember, if you ask people questions and they kindly take the time to answer them, you need to do something with the feedback you receive. If you don't, a) you've just wasted everyone's time, including your own, and b) you're risking seriously upsetting your volunteers.

Name .....

Date .....

		Y	N
1	I feel that my manager is always fair with people		
2	My manager is firm with people regarding what needs to be done		
3	I like my manager		
4	I feel that the organisation treats me kindly and values me		
5	I feel respected as a volunteer, by my manager and by the organisation		
6	The organisation is generous to me when it can be		
7	My manager is considerate towards me		
8	I am regularly thanked for what I do as a volunteer		
9	I can choose whether to become involved in a task or not		
10	There's enough variety in my volunteering role for me		
11	There are lots of opportunities to become involved if I want to		
12	If I'm not available to volunteer for any reason, that's ok		
13	I'm happy with the volunteering role I have at the moment		
14	It's easy to claim back my out-of-pocket expenses		
15	The standards I need to achieve for each task I do are clear to me		
16	My manager regularly reviews my performance		
17	I get regular feedback from my supervisor on how I'm doing		
18	If I'm not doing a very good job someone tells me straight away		
19	There's some flexibility in how I do my job as a volunteer		
20	I sometimes feel that the organisation takes advantage of me		
21	I feel that there's a division between paid and unpaid staff		
22	I've made friends with other volunteers		
23	I feel like a part of the team		
24	The paid staff sometimes make me feel like a 2 <sup>nd</sup> class citizen		
25	We're given free refreshments which makes me feel valued		
26	I spend time socially with some of the other volunteers		
27	The organisation has branded clothing which I'm proud to wear		
28	I'm part of a team which works well together		
29	Any complaints I have are dealt with immediately		
30	I'm proud to volunteer for this organisation		
31	When someone does a good job they are recognised for it		
32	There are lots of things I would change about this organisation		
33	My manager listens to what I have to say and takes it on board		
34	I'm involved in the decision-making process when it's appropriate		
35	I would recommend this organisation as a good place to volunteer		