



VOLUNTEER MANAGEMENT GROUND RULES

By Meridian Swift

Editor's note: Meridian's blog for volunteer managers is at www.volunteerplaintalk.com. We appreciate her sharing this guidance on how to manage requests for volunteer engagement, within the organization. This article is a condensed version of two Volunteerplaintalk blog posts. Links to those original posts are at the end of the article.

In this dream you walk up to a woman sitting at a desk. Behind her, a closed-door is visible in an otherwise blank wall. "I need," you say to her, "two camels, a box of jellied donuts and a ladder."

"When?" she says, writing it down.

"Tomorrow."

"I see." She rips the sheet of paper off the pad and disappears behind the heavy door, closing it with a thud.

That's the volunteer manager disappearing behind that door. Where has she gone? Are there actually camels back there? Will the donuts be fresh? Is the ladder being used by someone else? Is mine the only order she is filling? Will she be back by tomorrow?

Ground rules...In baseball, if a batter hits a ball that bounces off the outfield grass and into the bleachers, that's a ground rule double. It prevents the runner from unfairly advancing and the fielder from having to climb into the bleachers. Ground rules should apply in volunteer management, too. Without them, how can anyone requesting volunteer help know what goes on behind the closed door? How can they possibly know priorities, or time frames, or volunteer availability, or the feasibility of their request?

Too often, volunteer managers operate reactively, disappearing behind the door to field multiple requests at a time. Many of those requests are last-minute, some are more complicated than others, and some morph on a daily basis. On top of these requests, the volunteer manager is tasked with keeping revolving or permanent volunteer spots filled -- spots being vacated by volunteers who are absent for a myriad of reasons such as illness, vacation, moving or quitting.

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And sometimes, if we are brutally honest, the most reliable and skilled volunteers are paired with the squeakiest wheel and not the most engaging assignment.

So, let's imagine two volunteer spots are vacant. One spot is for a volunteer receptionist on the weekend when the staff receptionist is off. Phones have to be answered. The other spot is for a volunteer to deliver vital equipment to a client, also on the weekend. The client needs the equipment. Which one of these vacant spots takes priority?

With no ground rules, volunteer managers are expected to fill *all* spots, every time and in every requested time frame. It doesn't matter when the requests are made, or how many volunteers are needed.

To end the scrambling madness, we need to organize our systems for the good of everyone. With that in mind, what might our ground rules include?

Priorities: What volunteer requests are the most important and need be filled first, if all requests come at the same time? Client-based requests? Permanent or recurring roles that fill in for staff? Recurring roles that make the organization work, such as kitchen or receptionist help?

Time frame: Should a request made two days before an event have the same priority as one made weeks in advance? Having a clear chronological order or queue is a necessary ground rule. First-asked, first-filled priority will force staff to amend the last-minute request behavior. But wait. What if a volunteer calls in sick at the last minute for a higher-priority position? Does that request go to the front of the queue?

Feasibility of time spent: Requesting twenty volunteers who are willing to wait tables versus five volunteers to pass out flyers have differing time investments. How can this be addressed? Does a request requiring more time spent finding volunteers take precedence over one that is simpler? Does one major event attended by potential donors and stakeholders take precedence over smaller, lesser events?

Management buy-in: Setting ground rules won't work if the volunteer manager simply types them up and hands them out. There must be a buy-in from the CEO on down through the department heads and a willingness to support the volunteer manager.

Look at it mathematically. If there are too many requests with too little time and not enough skilled volunteers, some requests will go unfilled, right? With priorities set and ground rules established, the most beneficial and time-worthy requests will be filled first.

With ground rules, there's no more hiding the volunteer manager's effort, the juggling, the piecing together, the circling back, the reaching out, the doubling down, the soothing over, the listening to, the rearranging, the sorting, the skills assessing and all the other components needed to engage

volunteers. No more tearing our hair out behind the door and then smiling, stepping back outside while covering our bald spots with that crazy hair paint.

Ground rules are not just for baseball.

Now, let's look at some of the questions we might ask, to help us establish our volunteer management ground rules.

When proposing the adoption of priorities versus non-priorities to upper management, bring a few examples of how you look at prioritizing volunteer engagement. And don't be afraid to drop the "S" word: Strategy. As in, "in order to better serve the mission, let's strategize our priorities."

Your list of examples will spur senior management to adopt a "Priority Principle." Setting priorities means asking the following questions and *assigning a weight* to each one. Weight determines priority status.

Do the clients come first, no matter what? What does the mission say? Clearly, the client's needs are the reason we exist. This is a great place to start, because the weight should be the greatest.

What does the organization need to run smoothly? Volunteers are vital in keeping the organization running. Do volunteers fill in for staff when they are absent? Do volunteers take weekend shifts? Do volunteers occupy roles that must be filled in order to serve clients? The weight here has to be really high.

Which stakeholders count the most? Donors, dignitaries, potential clients and influencers all carry weight. What events or strategies involve the most bang for the buck? This is where weight will help you determine low priority requests. Staffing a booth at a last-minute weekend fair carries little weight against an annual festival with high visibility attended by key stakeholders.

Is the time frame reasonable? Weight needs to differentiate between last-minute and timely requests.

Is the request feasible? It might be hard to define feasibility, because we typically entertain all requests (*which does not imply all requests will be met.*) Having a listing or report outlining the skills, availability and interests of the volunteers can be applied against requests. Weight is equal to feasibility. For example, you can say...

At this time, we do not have any volunteers who have an interest in washing the board members' cars as a 'thank you.' Time spent trying to convince our volunteers that this activity is more meaningful than engaging with clients or keeping the reception desk staffed will deplete precious time from requests that further our mission.

What is the amount of work involved when enlisting volunteers? How many volunteers are requested, and for how much time? How specialized are the skills needed?



Are any of the following factors within the request out of the norm? (timeframe, location, ability to get to assignment, duties, weather, duration, stress level, etc.) Complicated requests require additional time. If the complicated request holds a high priority, then the weight of other requests is reduced by a factor reflecting the extra effort needed to obtain volunteers.

How does this engage volunteers? *We must add this one into the mix.* Volunteer retention or sustainability is directly related to engagement. Strategizing retention must be highly weighted.

We may not agree with all of the decisions made when the administration strategizes priorities, but we have to be flexible because having the administration's "stamp of approval" will be worth it the next time a flurry of requests are dropped on your desk.

NOTE: Here are links to Meridian's two original blog posts:

<https://volunteerplintalk.com/2018/03/07/volunteer-department-ground-rules/>

<https://volunteerplintalk.com/2018/03/14/attention-the-volunteer-department-now-has-ground-rules/>