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Moving Beyond Program: Developing a Volunteer Engagement Strategic Plan

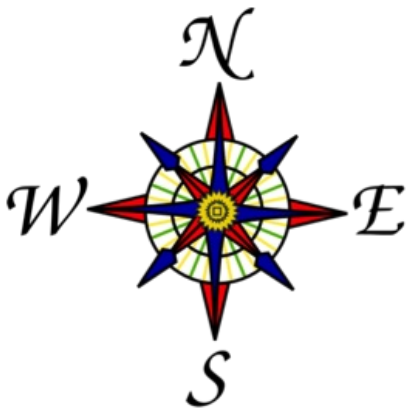
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By [Beth Steinhorn](#) [4]



Growth and change are exciting – yet they pose challenges as well. Nobody knows that better than the staff and volunteers at San Diego Humane Society, an animal welfare organization more than 125 years old. In late 2014, as Director of Volunteer Engagement Kim Soto was updating a longtime funder about recent organizational changes, both she and the foundation representatives had an “a-ha!” moment that would define the next year of activity. Soto was explaining how San Diego Humane Society was in the midst of “epic growth.” It had merged with another shelter just a few months before and had just completed merging with two additional programs – a wildlife rehabilitation center and a program that provides pet services and support to needy families and individuals with pets. Within the span of just a few years, San Diego Humane Society’s volunteer program grew from 2850 to over 5000, comprised of what had previously been four independent volunteer programs.



The question on everyone’s mind was a human resources one: “How should the volunteer engagement department be structured to best support our multiple campuses and programs?” Quickly the discussion took on an even bigger challenge: “How can we best unify these programs, maximize our resources, and leverage volunteer talent to support the organization’s overall priorities of reducing the number of homeless pets, strengthening the human-animal bond, providing safety net services for pet families in need, and inspiring compassion?” In other words, “What is our new overall volunteer engagement strategy?” That’s where we came in. Soto reached out to us at JFFixler Group as volunteer engagement consultants and strategists to explore these and other questions and, ultimately, to develop an overall strategy.

First Steps: Making the Case to Move beyond the Program Mindset

For decades, many nonprofit professionals and leaders considered volunteers as customers and categorized volunteer efforts as a “program.” Volunteer coordinators and managers have been responsible

for coordinating and managing volunteer programs, drawing upon established best practices (including the traditional “three Rs” of recruitment, retention, and recognition). Yet, about 10 years ago, in light of significant demographic shifts and fueled by equally dramatic economic and philanthropic transitions, we and other leaders in the sector began to shift our view of volunteer engagement from looking at volunteers as a “program” to instead viewing volunteer talent as a *resource* that could be strategically harnessed through an organization-wide strategy.

What does it look like when an organization embraces volunteer engagement as a strategy rather than treating it as a program? When volunteer engagement becomes a strategy, the focus shifts from considering volunteers as program participants to one in which volunteers partner with staff in achieving organizational mission. Instead of measuring success in terms of how many volunteers are recruited, how long they stay, and how many hours they contribute, success is measured by the impact of the volunteer efforts, through such mission-related outcomes as meals served, programs delivered, legislation passed, houses built, or, as in the case of San Diego Humane Society, animals fostered or adopted, pet therapy visits, dogs walked, or pet food distributed to underserved communities.

When an organization has a volunteer program, program managers are primarily responsible for recruiting, training, supporting, and holding accountable the participants in their program — namely the volunteers. By contrast, in a volunteer engagement strategy, the director of volunteer engagement functions primarily as an internal coach and consultant to all other staff members and volunteer leaders, supporting and coaching them to success in engaging volunteers as partners in achieving their departmental priorities, whether the department is a programmatic or operations department. In others words, volunteers become core to all functions of the organization – including outward-facing programs such as education, health services, or mentoring and internally-facing departments such as finance, human resources, and facilities.

When volunteer engagement is truly embraced across organizations, it is modeled at all levels, including by CEOs – who view themselves as “Chief Engagement Officers,” engaging volunteers in executive functions as well.

Below is a chart with additional distinctions between organizations with volunteer programs and organizations that embrace volunteer engagement as a strategy to help paint a picture of the difference.

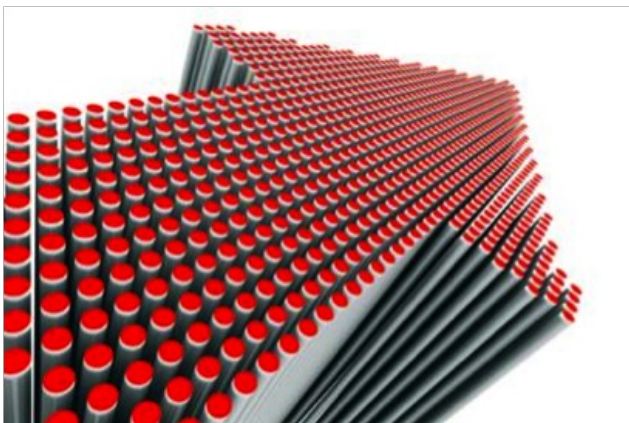
	Traditional Volunteer Program	Volunteer Engagement Strategy
Who is responsible?	Director of Volunteer Services	CEO and other Senior Leadership (CEO is viewed as the “Chief Engagement Officer”)
Where are priorities articulated?	In the Volunteer Department’s Action Plan	In the organization’s overall strategic plan, with volunteer engagement as a means to achieve all strategic priorities
What is the primary role of the Director or Manager of	To recruit, train, support, and hold accountable volunteers	To be an internal coach and consultant to all staff across the organization on how to engage and support volunteers strategically in

Volunteer Engagement?	for service	achieving <i>their departmental</i> priorities and efforts
How is success measured?	Volunteer satisfaction, numbers of volunteers, hours contributed	Impact of volunteer efforts
Where and how do volunteers serve?	Primarily in direct service roles	Throughout the entire organization, in every department and in support of every major strategic priority

Whether an organization is large or small, developing a volunteer engagement strategy requires both a shift of mindset and practice. Envisioning the shift is the first step, but understanding the value of making the shift is equally important.

Why Develop a Strategic Plan for Volunteer Engagement?

The answer lies in both what volunteers want and what organizations have to gain.



Volunteers today seek meaningful work with a measurable impact. Research as well as the experience of many volunteer directors shows that today's potential volunteers approach volunteering with a consumer mindset: If they do not find the type of meaningful volunteer opportunities they are seeking at one institution, they will leave, taking their time, talents, and passions elsewhere in search of the right fit.¹ Today's volunteers across generations want flexible schedules with shorter assignments, they seek to use their skills and/or gain new skills through volunteering, and, ultimately, they want to make a difference.² In other words, they want their efforts to be strategic.

Meanwhile, organizations that fully embrace volunteer engagement as a strategy see tangible benefits from their efforts. According to research conducted as part of Reimagining Service, organizations that embrace effective volunteer management practices see tangible returns on the investment, including the following³:

1. Organizations with strong volunteer management and that engage 50 or more volunteers are significantly and markedly stronger than their peers.
2. Nonprofits that manage volunteers well are significantly better led and managed overall.
3. Such organizations are also significantly more adaptable, sustainable, and capable of going to scale.
4. Having a strong volunteer engagement model requires strong and well-developed human resources management practices.

5. Organizations that engage volunteers well are equally as effective as their peers but at almost half the median budget.

All of these points are powerful tools in making the case for embracing volunteer engagement as a core strategy. Embracing volunteer engagement as a strategy is a multi-step process. As noted above, being able to envision the change is the first step, followed closely by understanding the value in doing so. Clearly, making the shift takes time and effort – but additional research shows that the financial payoff is measurable. According to Deloitte, organizations that make volunteer engagement core to their mission and operations deliver a 600% return on investment (ROI) in volunteer capacity. In other words, for every dollar invested in engaging, supporting, and training volunteers, the organization can expect up to \$6 in return through more effective program delivery⁴.

Organizations that embrace volunteer engagement as strategy...

- Excel in volunteer engagement
- Leverage volunteers and their skills at all levels
- Deliver a 600% ROI in volunteer capacity
- More effectively address needs
- Operate at almost half the median budget of their peers
- Are better positioned to grow, adapt, or sustain⁵

The Case for Change in San Diego

For San Diego Humane Society, statistics are a driving force, as the organization is data driven in its efforts to reduce pet homelessness and in all other service areas. But, in deciding to develop a strategic plan for volunteer engagement, circumstance was as influential as statistics. As Soto explained to her foundation partners, San Diego Humane Society was in a period of significant growth. With the addition of two new major programs to the animal shelters already spread over three campuses across a large county, leadership recognized the need for more consistent volunteer engagement practices. Soto, her team, and executive leaders also recognized that, in order for these mergers to be successful, the volunteers would need to see themselves as part of the overall mission, while still nurturing and validating the vital role they each played in the program or shelter where they had originally volunteered and where they likely would continue to volunteer.

Additionally, San Diego Humane Society had recently completed an organization-wide strategic planning process, with clear operating models, standards, policies, and metrics for success. This strategic plan called for increased community engagement that required volunteers to open their homes to become foster parents or participate in more robust, hands-on programming throughout the organization. The plan was a key factor in making the decision to invest in developing a strategic plan for volunteer engagement. Another key factor was the fact that both leadership of the Humane Society and of the foundation recognized that the volunteer landscape is changing and that by employing new or different strategies to engage volunteers, the Humane Society could better leverage volunteer talent toward achieving the goals of reducing the number of homeless pets, nurturing animal-human bonds, increasing awareness and understanding of animal issues in the county, and inspiring compassion.

With data around the benefits of strategic engagement in hand and the urgency that the organizational mergers presented, San Diego Humane Society engaged us at JFFixler Group to assess their current state of volunteer engagement, develop a strategic plan for volunteer engagement to map their future actions, and write a volunteer engagement guide to direct their daily practices across all campuses and programs. In

other words, we worked with them to map out and implement a shift from volunteer program to volunteer engagement strategy while engaging staff from across the organization to collaborate on identifying the destination, map out the journey, and get others to jump on board!

Mapping Starts with Knowing Your Current Location

With an understanding of the shift from program to strategy in mind, the next question is, naturally, how to achieve that shift. That's where the Volunteer Engagement Strategic Plan (VEP) comes in. Strategic planning is a process to define organizational direction and strategy and make decisions on resource allocation to pursue this strategy. A VEP defines direction and informs decisions because it articulates a vision for volunteer engagement, establishes values that guide actions, and identifies three to five critical issues that must be addressed to achieve that vision. Each issue includes goals, objectives, metrics for success, and more vital details to guide action.

Developing a VEP involves more than merely writing. In fact, writing the plan is, in many ways, the easy part. The major time and investment fall to the preparation phase that precedes the writing. For San Diego Humane Society, writing the plan took about three months, but the preparation was a five month endeavor. This important phase included discovery and engaging key stakeholders in the process.

Ideally, the discovery phase focuses both internally and externally. Internally, an organization should assess its current volunteer engagement practices to identify strengths, weaknesses, and opportunities for change. Internal assessment would ideally be conducted by an objective party who reviews policies and documents and systematically gathers feedback from staff, volunteers, and other stakeholders such as program participants, funders, and community partners. When conducting external research, the goal is to better understand the environment in which the organization operates, both currently and in the future. External research may include exploring trends in volunteer engagement, identifying and understanding emerging issues related to organizational mission (e.g., new legislation that could affect services, new technologies that could change the types or means of services delivered, economic factors that could increase or decrease demand for services), or other organizational factors such as a new building or changing leadership.

For San Diego Humane Society, the external assessment was a combination of the work the organization had already undertaken through its overall strategic planning process and ongoing research of volunteer engagement trends.

Internally, our assessment included:

- An online survey of staff and volunteers, completed by more than 600 individuals
- Site visits to most campuses and programs
- Interviews with more than 30 staff and volunteers
- Reviews of volunteer engagement documents, policies, and procedures

Through compiling and analyzing the data, we learned that the foundation of volunteer engagement at San Diego Humane Society is strong. Our findings and recommendations were summarized and presented in a report and included these highlights:

- Volunteers at San Diego Humane Society are an integral resource, valued by staff.
- Volunteers perform many roles and activities and are well supported.
- A strong foundation of volunteer engagement practices supports the organization, including written position descriptions, centralized orientation process, and training opportunities.

Of course, some challenges surfaced. While none of these challenges were surprising to the Volunteer Engagement Director or executive leadership, having data to confirm their experience paired with our specific recommendations for action proved valuable. Below are a few examples of issues, interview quotes and our related recommendations.

Issue 1: Nature of volunteer work and roles

While volunteers perform a great variety of roles, some staff members reported, “There is lots of staff time spent keeping volunteers busy, not saving staff time.”

Recommendations:

- Ensure that every existing or new volunteer role is strategic and directly aligns with mission-fulfillment.
- Refine volunteer position descriptions to focus more on key responsibilities and strategic impact of the work.
- Accept volunteer applications only for open positions.

Issue 2: Consistency across all campuses and programs

While the basic practices of volunteer engagement were relatively strong in each of the previously independent programs and campuses, they were not consistent, which made it challenging for volunteers who sought to volunteer in multiple sites (let alone for staff who had responsibilities in more than one site!). One volunteer explained, “I would like to see all campuses function the same way...with the same rules that apply there to apply here so that you can walk into a campus and do the same thing.”

Recommendations:

- Develop a comprehensive volunteer engagement guide to help staff and volunteer leaders across the organization engage and support volunteers consistently.

Issue 3: Staff workload

Engaging and supporting volunteers takes time. When staff members are overloaded or when they aren't thoroughly trained in engaging volunteers that effort does not seem worth the time. This surfaced in a few different ways, from dedicated staff willing to always put in extra time to those who recognized that they could simply use some additional training.

Recommendations:

- Create more volunteer team leader positions to build staff capacity to manage and support volunteers.
- Provide animal care staff with training and support they need to engage and support volunteers in their own departments.

Tips for Assessing Volunteer Engagement

An extensive assessment of volunteer engagement reveals valuable information to guide volunteer engagement strategy, yet even inexpensive, less formal steps can also reap useful data. Here are some other approaches.

1. Understand the differences and unique benefits of different research methodologies. Surveys gather consistent feedback from large numbers of people, while interviews or focus groups reach smaller numbers of people but allow researchers to go deeper on certain topics.
2. Develop and distribute a survey on volunteer engagement attitudes and practices to staff and volunteers. Many online survey programs are low cost or free for short surveys. You can also use a [free, downloadable assessment](#) [5] available from JFFixler Group.
3. Partner with others who conduct audience research at your organization (program evaluators, grant administrators, or marketing staff) to have questions added to surveys or interviews already in the works.
4. Engage volunteers with expertise in market research or program evaluation to provide coaching or pro bono services!
5. Hire a consultant to design and conduct research and present recommendations.

Convening all the Key Players

One of the hallmarks of a successful planning process is getting the right people around the table. For us, a cross-divisional retreat including volunteer engagement staff and staff members and volunteers from across the organization is the heart of the process. As consultants, we do not write the plan. If we did, the essential buy-in from the staff members responsible for implementing the plan would be missing. Instead, we facilitate a retreat where participants review the research data and recommendations, jointly develop a vision for volunteer engagement, isolate critical issues, and identify the actions to address each critical issue along with a timeline, resources, and metrics for success. In other words, in just one or two very full, but very exciting days, participants develop the core of the plan, which is then finalized over subsequent weeks to add the final detail and gather additional input from other staff and volunteers with our support and coaching.

In San Diego, 30 participants from across campuses and programs convened at a planning retreat. Among them were executive leaders, program managers, medical staff, and volunteer engagement department staff. While many of these individuals had come together before for occasional meetings, this retreat marked the first time that many of the staff from the newer programs had been included and it was the first time that most of these individuals were able to participate in discussions on the strategic level.

After reviewing the assessment report and recommendations (which they had received prior to the retreat), we facilitated the participants as they developed a vision for volunteer engagement and identified the values to guide volunteer engagement decisions and actions.

Volunteer Engagement Vision: *Impactful service for compassionate hearts*

Volunteer Engagement Values:

Support
Teamwork
Compassion
Dedication
Education
Service

Given the assessment results and recommendations, it wasn't difficult for the team to identify critical issues, which are the issues that must be addressed in order to achieve the engagement vision within the next three years. For San Diego Humane Society, those issues are:

1. Develop the right volunteer opportunities that are mission and values aligned
2. Establish practices that are pillars of our desired culture
3. Provide tools, resources, and strategies for success
4. Nurture connectivity and consistency across all campuses and programs

While at the retreat, sub-groups worked on identifying long term goals and measurable objectives for each issue and, following the retreat, they fleshed out the objectives and developed metrics for success, evaluation plans, and realistic timelines for every step. Compiling the group work was a big task but an exciting one which Soto, Director of Volunteer Engagement, embraced with enthusiasm and completed by the end of the summer with our support.

Bringing a Plan to Life



The result of these months of effort? The results are embodied in a beautiful three-year plan for Volunteer Engagement, printed and bound in color, distributed to senior leadership, board members, and every department. More importantly, the outcomes are demonstrated throughout the Humane Society. Thanks to this plan, San Diego Humane Society has a shared “destination” for volunteer engagement and a detailed map to get there, with the itinerary, resources, and “drivers” identified clearly for the journey. By building in checkpoints to assess progress against the plan, the organization is also better positioned to adjust to unexpected events and can more easily “recalculate” the route (just like a GPS!) to ensure they keep heading towards their vision.

While many action items have already been tackled (i.e., position descriptions have been revised, a procedures guide has been drafted), the biggest changes are emerging from having involved cross-divisional input from the start. Thanks to the collaborative process, staff and volunteers from different sites are talking the same language, share mutual goals, and support each other to success. Each campus now has its own cross-divisional team that is developing a new model of supervising, training, and supporting volunteers working directly with animals and defining new ways for volunteers to assist in strategic work. They understand that harnessing volunteer talent is vital to achieving their organizational priorities and that a volunteer program is not enough, rather their success depends on having an organization-wide strategy for volunteer engagement. They have truly made the shift from program to strategy.

Tips for Successful Planning and Implementation

Developing and implementing a Volunteer Engagement Strategic Plan takes time and effort, but the results are worth it. If you decide to plunge in, here are some important things to remember.

Get leadership buy-in.

- Articulate the value and potential of a volunteer engagement strategy. Become familiar with the research and develop statements of return on investment to share with staff and board leadership.

Involve the right people in the process.

- Be sure to include representatives from all divisions/departments in the process as well as individuals from different organizational levels, including volunteers

Treat the plan with respect and ongoing attention.

- Make the plan look as professional as it is
- Include tracking and updates to the plan on senior staff and board agendas, as well as on departmental meeting agendas for ongoing attention

Make implementing the plan an organization-wide priority.

- Write volunteer engagement into staff position descriptions
- Position volunteer engagement staff as leaders of this strategy
- Have Director of Volunteer Engagement attend senior staff meetings to provide regular updates
- Have Volunteer Engagement staff attend other departmental meetings to provide support and receive updates on plan

Measure and share results.

- Track progress against the plan
- Update everyone with any changes or additions
- Share and celebrate successes throughout the organization!

1. VolunteerMatch, *Great Expectations: Boomers and the Future of Volunteering*, 2007 (San Francisco, CA MetLife Foundation), 10-11, www.volunteermatch.org/nonprofits/resources/greatexpectations [6]; “A Generation for Causes: A Four-Year Summary of the Millennial Impact Project” http://fi.fudwaca.com/mi/files/2015/10/MIP_4Year_Summary.pdf [7]

2. INSERT Research links on what today’s volunteers are seeking – could include any or all of the following: Volunteeringinamerica.gov; *Millennial Impact Report*, *Great Expectations* or *Boomer Volunteer Engagement Collaborate Today, Thrive Tomorrow*; *Cause for Change*; plus a resource for Gen X, for example.

3. Reimagining Service, “National Core Capacity Assessment Tool Dataset; ‘Positive Deviants’ in Volunteerism and Service” 2009. <http://reimaginingservice.org/sites/default/files/u2/TCC%20Group%20Positive%20Deviant%20Research.pdf> [8]

4. Reimagining Service, “Nonprofit Service Enterprise: Research Summary” 2010. http://reimaginingservice.org/sites/default/files/u17/Researchsummary_Deloitte_2010.pdf [9]

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[5] <http://www.jffixler.com/assessment-volunteer-engagement>

[6] <http://www.volunteermatch.org/nonprofits/resources/greatexpectations>

[7] http://fi.fudwaca.com/mi/files/2015/10/MIP_4Year_Summary.pdf

[8]

<http://reimaginingservice.org/sites/default/files/u2/TCC%20Group%20Positive%20Deviant%20Research.pdf>

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