



The Keys to Volunteer Retention

Strategies for Hanging On to Your Talent

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Helping Build and Sustain GREAT Organizations!

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Jeff Russell, co-director of **Russell Consulting, Inc. (RCI)** with his wife Linda, specializes in helping leaders build productive, supportive, and motivating work environments. *RCI* helps companies develop their leadership and strengthen team performance to achieve their great performance goals and outcomes. By guiding the

exploration of key values held in common by organizational members and developing strategies and actions to express these values-in-action, *RCI* helps organizations achieve their strategic vision.

Through processes that include "visioning" retreats, Future Search conferences, process redesigns, improving decision making processes, implementing quality improvement strategies, and providing a variety of skill-building seminars, *RCI* enhances long-term organizational effectiveness and performance.

Consulting Expertise

Jeff consults with companies in the areas of:

- Visioning and strategic planning
- Leadership development
- Leading and implementing change
- Performance management systems
- Employee engagement assessment
- Customer and employee focus groups
- Team assessment and intervention
- training needs assessment
- Organizational design
- Self-managed teams
- Problem solving and decision making

Training Expertise

Jeff conducts an array of leadership and team development seminars on such topics as:

- Surviving difficult conversations
- Fearless performance reviews
- Leadership and strategic thinking/planning
- Leading fearless change
- Communication skills
- Dealing with difficult people
- DiSC Behavioral Profiles
- 360 leadership assessment and development
- Effective meeting management

- Decision making and problem solving
- Managing conflict and win/win negotiations
- Performance management and coaching skills
- Team building fundamentals
- Team leadership and facilitation skills
- Customer service

Professional Background

Jeff serves as an adjunct faculty member at University of Wisconsin-Madison and UW-Milwaukee. He also teaches for the UW-Madison, UW-Eau Claire, and UW-La Crosse Small Business Development Centers.

Jeff has a bachelor's in Humanism and Cultural Change and a Masters of Science degree in Industrial Relations from UW-Madison.

Before forming RCI, Jeff served as human resource coordinator for the Wisconsin Department of Administration (DOA). At DOA, Jeff developed and coordinated their employee assistance, leadership and employee development, and equal employment opportunity/affirmative action programs.

Jeff is a past VISTA volunteer – assisting Wisconsin tribes with economic development and working with at-risk youth on the Lac du Flambeau Reservation in northern Wisconsin.

Conference Presenter and Author

Jeff is a sought-after speaker at state, national and international conferences. Recent presentations include:

- ♦ ASTD International Conferences — 2001 through 2011
- ♦ Jamaica Employer's Federation Conference, Ocho Rios, Jamaica, 2004, 2006, 2007, 2009
- ♦ 2005 Minnesota Quality Conference
- ♦ Minnesota Project Management Institute, PDD 2007, 2008, 2009, 2011, 2012, 2013, 2014, 2015, 2016
- ♦ Wisconsin SHRM Annual Conference, 2004 through 2007, 2010, 2011, 2012, 2013, 2016
- ♦ Wisconsin Child Welfare Annual Conference, 2012
- ♦ *Leading Change*, Shanghai, China
- ♦ *Emotional Intelligence in Action*, Kuala Lumpur, Malaysia, 2012

Jeff and his wife Linda have co-authored nine management books including ***Leading Change Training, Strategic Planning Training, Change Basics, Strategic Planning 101, Ultimate Performance Management***, and ***Fearless Performance Reviews*** (McGraw-Hill, 2014).

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Why Volunteers Stay or Go

What are the Factors that Cause Volunteers to Leave?

Based upon your experience, what are the factors that cause volunteers to leave?

What are the Factors that Cause Volunteers to Stay?

Based upon your experience, what are the factors that have the greatest impact on whether volunteers stay with your non-profit?

Effective Volunteer Retention Strategies

Goal of Retention: Building Community and Enabling Engagement

The more that volunteers are embedded in their volunteer jobs and the more they see themselves as part of a larger community the more they are likely to be engaged. And the more engaged they are in their volunteer experience, the more likely they are to have ownership. The greater the ownership they feel over their volunteer experience, the more likely they will stay.

Thirteen Effective Volunteer Retention Practices

Non-Profits can help create community and enhance volunteer engagement through such practices as:

1. _____ **Right** – Recruiting right involves providing realistic previews of their volunteer experience so that a candidate knows in advance what they are signing up for. Selling the volunteer opportunity as it really is vs. an idealized version of the work leads to less disappointment and turnover when the reality of the actual volunteer experience sets in.
2. _____ **the Right Way** – Take the time to onboard volunteers to your agency: vision, mission, core values, programs, services, clients served. Orient them to and sell the *cause* and larger purpose of their volunteer work rather the agency they are volunteering for. Stress the value and importance of their volunteer work to the agency's mission and clients and note the experience they are likely to have as a volunteer and why their contribution of time and talent matters.
3. **Make a Good _____ and Give the Volunteer Choices** – Explore what the volunteer is looking for from their volunteer experience; match these interests, passions, and motivations with the volunteer opportunities that you have to offer; and then give the volunteer a menu of possible options. Letting them make a choice leads to a higher level of engagement.
4. **Define _____ – in Both Directions** – Find out if he/she is looking for a long- or short-term volunteer experience and then ask for a commitment to a minimal duration (e.g., 1 year, 18 months, etc.). Discuss what the volunteer can expect from the agency (e.g., a meaningful experience, training, mentoring, support, volunteer recognition banquet, etc.) and identify what your agency expects of its volunteers: following through on commitments, respecting the agency's mission and values, ideal and unacceptable behaviors for volunteers, and being assertive about ensuring that their volunteer experience is meeting their needs.
5. **Build a One-On-One _____** – A key factor influencing volunteer engagement and retention is the individual volunteer feeling connected. Volunteers want to feel personally connected with others at your agency. It starts with the volunteer coordinator taking the time to get to know the volunteer.

Making personal contacts with others at the agency early on solidifies the relationship and the volunteer's commitment.

6. **Give the Volunteer as Much _____ as Possible** – Give the volunteer as much authority, responsibility, and decision making over their work as possible. This builds ownership over their volunteer experience and strengthens their level of engagement. Be very clear, however, as to the limits or boundaries to their authority: when they need to consult others vs. going with what they think is right. Be careful not to set the volunteer up for frustration by carefully defining the limits or parameters that they must respect.
7. **Build a Sense of _____** – Connecting the volunteer to your agency doesn't mean just with you or the volunteer coordinator. Create opportunities for bringing each volunteer into as much of the agency's community as they want: volunteer events, staff/volunteer celebrations, client/volunteer events, staff meetings, agency picnics, etc. People need to feel that they are joining something that connects them with a larger community. Feeling connected facilitates volunteer engagement and retention.
8. **Guide, Develop, and _____ Them** – A volunteer doesn't want to be dropped into the deep end of the pool without knowing how to swim. Help build the volunteer's self-confidence in their task by offering one-on-one or group training, mentoring by another volunteer or staffer, or coaching on effective practices. Whenever possible, develop written standard operational practices (SOPs) or job aids such that they don't feel they have to reinvent the wheel or remember everything that you or a mentor might have shown them. If you provide them with SOPs, let them know how rigid they are: must these steps be followed precisely or are these just rough guidelines in how to perform the task?
9. **Train Agency _____ on How to Work with Volunteers** – Take the time to orient and train paid staffers such that they know how to effectively interact with or manage the volunteers with whom they work. All of your efforts to build volunteer engagement can come crashing down in seconds if an agency staffer fails to treat the volunteer with respect or offer support and guidance when needed. Make sure that all of your paid staff understand and appreciate the role and value of volunteers to your agency's success.
10. **Conduct “_____” Interviews** – The best way to ensure that your volunteers remain engaged volunteers is to routinely conduct “stay” interviews. During the occasional (at least once a year) stay interview, you explore the quality of the volunteer's experience with your agency by asking such questions as:
11. **Ask for their _____** – Volunteers have a unique perspective on the work your agency does. You can benefit from this experience while demonstrating your respect for their view when you invite them to provide you feedback on ways to improve both the volunteer experience as well as potentially enhance your agency's programs and services. Volunteers get to know your agency very well – the soaring successes and the rough spots. Leverage the knowledge and experience of your volunteers to help improve not only the volunteer experience but also your agency's operations, programs, and services.

12. **Show _____** – Volunteers are self-motivating. Their energy to serve drives them to do great things for your agency and its services and clients. But volunteers can get burned out, worn out, and tired out if their services are taken for granted. Yes, they are self-motivated, but if we don't take the time to thank them, celebrate them, appreciate them, or reward them, they are likely to wind down their volunteer commitments and move on to where others let them know that they are making a difference.
13. **Conduct “_____” Interviews** – When a volunteer decides to stop giving your agency his or her time, it's important that you find out why. Asking an exiting volunteer why they are ending their volunteer service and what the agency could have done differently to prevent them from exiting can help you improve the volunteer experience. Exit interviews should be conducted in the final few hours of the volunteer's time with your agency to assess the quality of their volunteer experience. Example questions include:
- *What did you like best about volunteering for us?*
 - *What did you like least?*
 - *To what extent did we fully utilize your experience and expertise?*
 - *Why did you first start volunteering for us? What caused you to start thinking about ending your volunteer time with us*
 - *If you were to make one suggestion for ways that we could improve the volunteer experience for future volunteers, what would it be?*
 - *What was the most meaningful part of your volunteer experience with us?*
 - *What was your least meaningful part of your volunteer experience?*

Motivation 3.0: Bringing Out the Best in Others

Adapted from *Drive: the Surprising Truth About What Motivates Us* (Riverhead Books, 2009) by Daniel Pink

1. **For volunteer jobs that require some degree of thought, creativity or problem-solving:** For volunteer jobs that require independent or creative thinking or problem solving, simply offering rewards and negative consequences (punishments) not only doesn't work, it is often counterproductive. Instead, motivation 3.0 research suggests that there are three elements that volunteers doing this kind of work require for their internal motivational potential to be unleashed:
 - a. **Autonomy** — The desire to direct our own lives. Autonomy is defined as being able to control the **task** (what they do), **time** (when the work is done), **team** (who they do the work with), and **technique** (how the work is done). People who have autonomy are more likely to develop intrinsic motivation for their work.
 - b. **Mastery** — The urge to make progress and get better at something that matters. Mastery refers to the ongoing pursuit towards perfection in a task. It is the nature of mastery and perfection, however, that this outcome only be approached and never fully attained. Hence, mastery is a never-ending journey focused on personal and professional learning and growth.
 - c. **Purpose** — Purpose is the yearning to do what we do in the service of something significant and meaningful. Purpose refers to doing something that matters to you, doing it well, and doing it in the cause of something larger than yourself.

2. **For routine/rote/repetitive volunteer jobs that don't require much thought, creativity, or problem solving:** For volunteer jobs that neither inspire great passion in others nor require critical thinking or creative problem solving, the research suggests that offering carrots (tangible rewards) won't hurt and actually might help. Beyond offering rewards, however, you'll actually increase your chances of success with others who do this kind of volunteer work by supplementing these concrete rewards with three important practices:
 - a. Offer a rationale for why the routine task is necessary. Explain how the task contributes to a larger purpose. Identify why it really matters that the job be done well (the short and longer-term benefit of the task to clients, the agency, the community, etc.).
 - b. Acknowledge that the task may be uninteresting or even boring – and again link it to the larger purpose as to why it still matters that it be done well
 - c. Give those tasked with doing the work as much autonomy as possible in how they complete the task. This includes flexibility in *when*, *how*, and *with whom* they do perform the work.

Stay Interviews – Before it's too Late!

Why a Stay Interview?

By the time a valued volunteer quits, you've already lost an irreplaceable asset. Sometimes such a departure has nothing to do with the agency's actions; other times, however, there are things that the agency could have done that might have caused the volunteer to stay vs. walk toward the exits.

A "stay interview" asks valued volunteers on a regular basis why they continue to choose your agency. The interview also explores what the agency could do to ensure that these employees continue to choose volunteering for you.

With Whom Might You Conduct Stay Interviews?

- Star volunteers
- Volunteers with essential knowledge/experience
- Volunteers identified as those with even greater potential talents to give
- Individuals whose departure might cause other volunteers to leave

Topics to Explore

The stay interview covers many of the same topics as the exit interview. The greatest difference is the focus on identifying what's working and what's not and how these might influence the volunteer's *future* intentions and behaviors.

- General questions about the volunteer experience itself
- Onboarding and orientation to their volunteer role
- The agency's culture or environment and its impact on the volunteer experience
- Opportunities and quality of volunteer development
- Personal growth or career opportunities
- Quality of volunteer management
- Quality of interactions with agency leaders and staff members
- Relationships with other volunteers
- Recognition and rewards – what they find valuable/not-valuable
- Agency strengths
- Changes that could be made for a better volunteer experience
- The volunteer's long-term expectations as a volunteer
- What might cause the volunteer to ever consider leaving . . .

Example “Stay” Interview Questions

1. Are you having the “best volunteer experience of your life?” If YES, describe why. If NO, what circumstances, if they changed, would enable you feel this way?
2. What do you like best about your volunteer experience with our agency?
3. To what extent do you feel that your volunteer work makes a difference in this agency, to our clients, and to the broader community on this ten-point scale: 1 = not at all to 10 = significantly so? What could move your number closer to a 10?
4. To what extent are we fully utilizing your skills, knowledge, and talent in your current volunteer role on this ten-point scale: 1 = not at all to 10 = significantly so? What could move your number closer to a 10? How else could we take advantage of what you have to offer us?
5. What frustrates you in your current volunteer role? What inhibits your engagement, creativity, and overall performance as a volunteer?
6. If you could change three things about your current volunteer role, what would they be?
7. What factors/aspects about your current volunteer role do you find most satisfying?
8. Describe the quality of interactions you have with agency leaders and staff members. To what extent are you respected and listened to? To what extent do they seek you out for ideas on ways to improve your volunteer experience or the agency and its services?
9. What would you like to see more of in the volunteer environment here to bring out even a higher level of engagement and commitment in you?
10. Have you ever considered volunteering elsewhere? If so, what were you looking for in another agency that we don't have here to the same extent? What, in the end, caused you to stay with us?
11. To what extent are you recognized, praised, or rewarded in a way that increased the level of your volunteer commitment on this ten-point scale: 1 = not at all to 10 = significantly so? Describe a recent situation where this happened for you.
12. What other ways might we acknowledge, reward, or celebrate your contributions as a volunteer that you would find affirming?