



## **Rebuilding the Volunteer Spirit: Tales from 5 Associations**

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### **Content Leaders:**

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# RE-INVENTING VOLUNTEER PROGRAM: BEING THE CATALYST, NOT THE HUB

## *Maryland Association of CPAs*

Tom Hood, CPA, CITP, CGMA \* Executive Director/CEO \* [tom@macpa.org](mailto:tom@macpa.org)

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The biggest gathering of volunteers doesn't look like a volunteer event to many, but to Tom Hood, CEO of the Maryland Association of CPAs, it is indeed. Twice a year, MACPA hosts a series of town hall meetings to gather members for the typical updates, some education and conversation. To Tom and his leadership, what's actually happening is a volunteer experience: through conversations and sharing,, members are creating content. The association acts as a lookout post, sharing the latest trends and issues facing the CPA profession, and members share their insights. MACPA's town halls are designed to facilitate member engagement. It's all part of a plan to be, as Tom says, the catalyst, rather than the hub.

This much broader definition of volunteer is an outgrowth of a collaborative strategic process MACPA went through in 2000 following on the heels of a dramatic "reinvention plan" crafted in 1999. This plan set the course to align the organization with its vision. At issue were three warning signs: some dissatisfaction expressed by volunteers in the traditional structures of committees and chapters; a lack of new and younger members participating; and a sense that members were less inclined to engage in the critical changes facing the CPA profession. At about this time, Tom attended a 2000 ASAE think tank session on "community as strategy," which prompted him to consider this question: If member value relates to community, the core of the association is the community. Was MACPA leveraging this community?

The facts suggested otherwise. First, while the organization had a clearly articulated strategy to move the mission, the leadership identified needs around a few big things for which it didn't seem to have resources. Second, the organization was spending an extraordinary amount staff time and resources supporting committees and chapters, which were not working on those strategic needs. It was the classic case of you can lead the volunteer horses to water, but you can't make them drink. Early attempts at encouraging them to take up more strategic projects failed miserably.

Those two lenses – seeing opportunities for big strategic things combined with the lack of resources while maintaining the traditional committee/volunteer/chapter work – prompted a call for a paradigm shift. "We needed to move resources from committees to projects that mattered," said Tom. And they did – but the "they" is not the board or some subset but rather all the stakeholders – members, leaders, grassroots and staff. And that is where being the catalyst rather than the hub is the difference that mattered.

### **Reimagining the Volunteer Role**

MACPA called a volunteer meeting at which each of the committees and member groups worked through a process to assess their activities, evaluate alignment against the MACPA strategic plan and

uncover any misalignments. Working with a grid where the X axis was high value to members and the association and the Y axis, alignment to strategy, the volunteers posted each of their activities of their committees and groups on the grid.

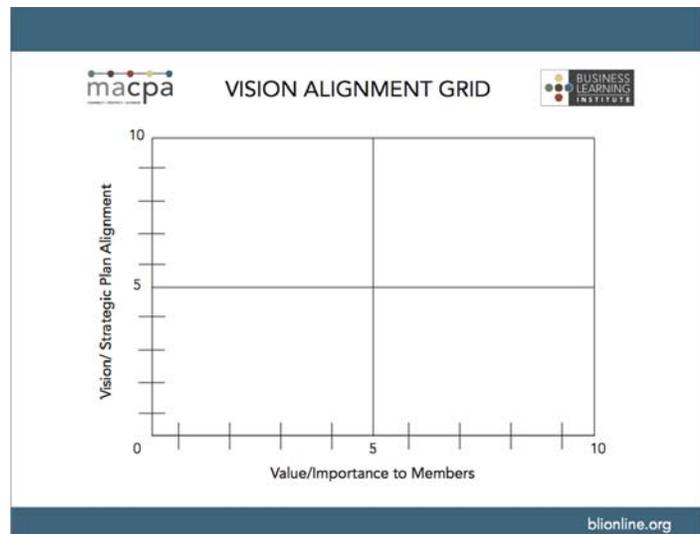
The results were surprising. The highest value and strategically aligned activities would be in the upper right quadrant, while the lowest value and strategic programs would be in the lower left quadrant. The lowest left quadrant was filled with sticky notes of activities that the volunteers self-selected as low value, low strategy. Only a couple of stickies made it to the other three quadrants. It was a “eureka” moment of the worst kind.

A task force, divided into under-35 and over-35 teams, was formed to tackle the question of what to do. The two teams worked independently albeit a bit differently. As you can image, the younger team harnessed technology while the older team relied on traditional meetings. It may surprise many of us in the association world who lament the generational differences, but both groups basically came to a similar conclusion: pull resources away from committees and chapters doing low priority work and refocus them on activities and projects that were in the high-high quadrant. This eventually ushered in a complete governance restructuring – including a leaner board and a re-organized staff – and a shift in the philosophy about volunteering.

The philosophical shift may be the most significant part of the story. MACPA moved from a volunteer structure based on tradition to one based on engaging members in the mission. And the mission redefined the MACPA’s role and required a move from being reactive (ask members what we should do next) to being proactive (engage members in dialog about the future). This drove them to break down formal structures and volunteer terms. Committees for example are no longer required to have monthly meetings and fulfill checklist requirements. Rather, they focus on sharing and networking. Chapters need not offer a laundry list of services and have time-consuming election processes. They focus on delivering what members want: low-cost CEUs.

Under this new vision, groups were called to live by two tenets: be self-organizing around vision and mission, and be sustainable; expect no life-support. MACPA eliminated many of the rules and allowed the groups the freedom to use whatever titles and selection processes worked.

As part of this new volunteer vision, MACPA actively developed low commitment opportunities that drive the mission, such as lobby day in the state capital, community projects, online content contributors and, yes, the town halls. By actively promoting and welcoming volunteers, members have a stronger alignment with the association. So while they took resources away from an inner circle of



volunteers, they redeployed these to expand their member engagement and today estimate that more than 25 percent of their 10,000+ members are volunteering or engaging in some small or large way.

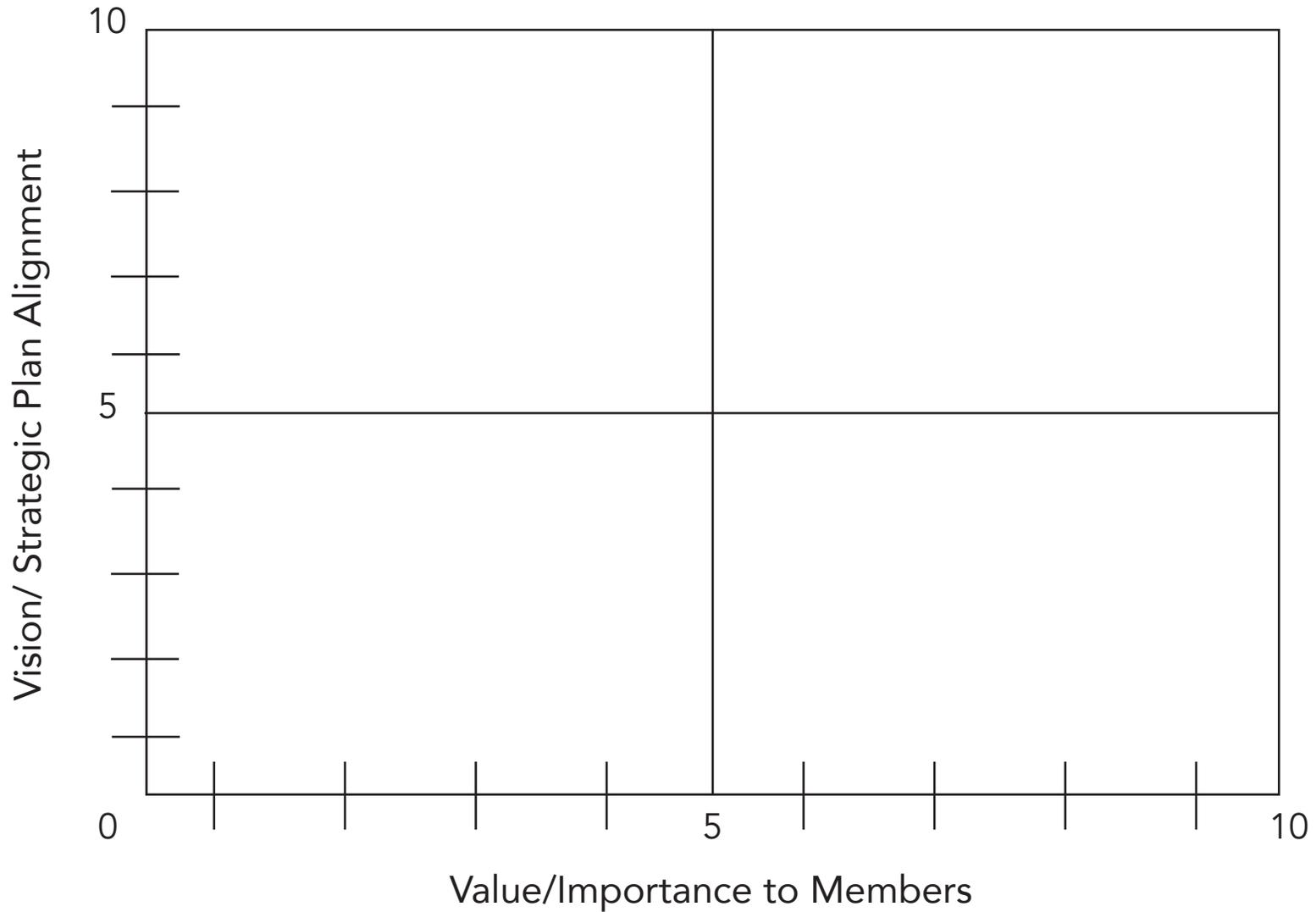
Tom believes that associations could well be the road kill on the information highway if we don't move, as Jim Collins says, from organizations that are well managed to networks that are well led. Which of course goes back to empowering the community of volunteers in our associations.

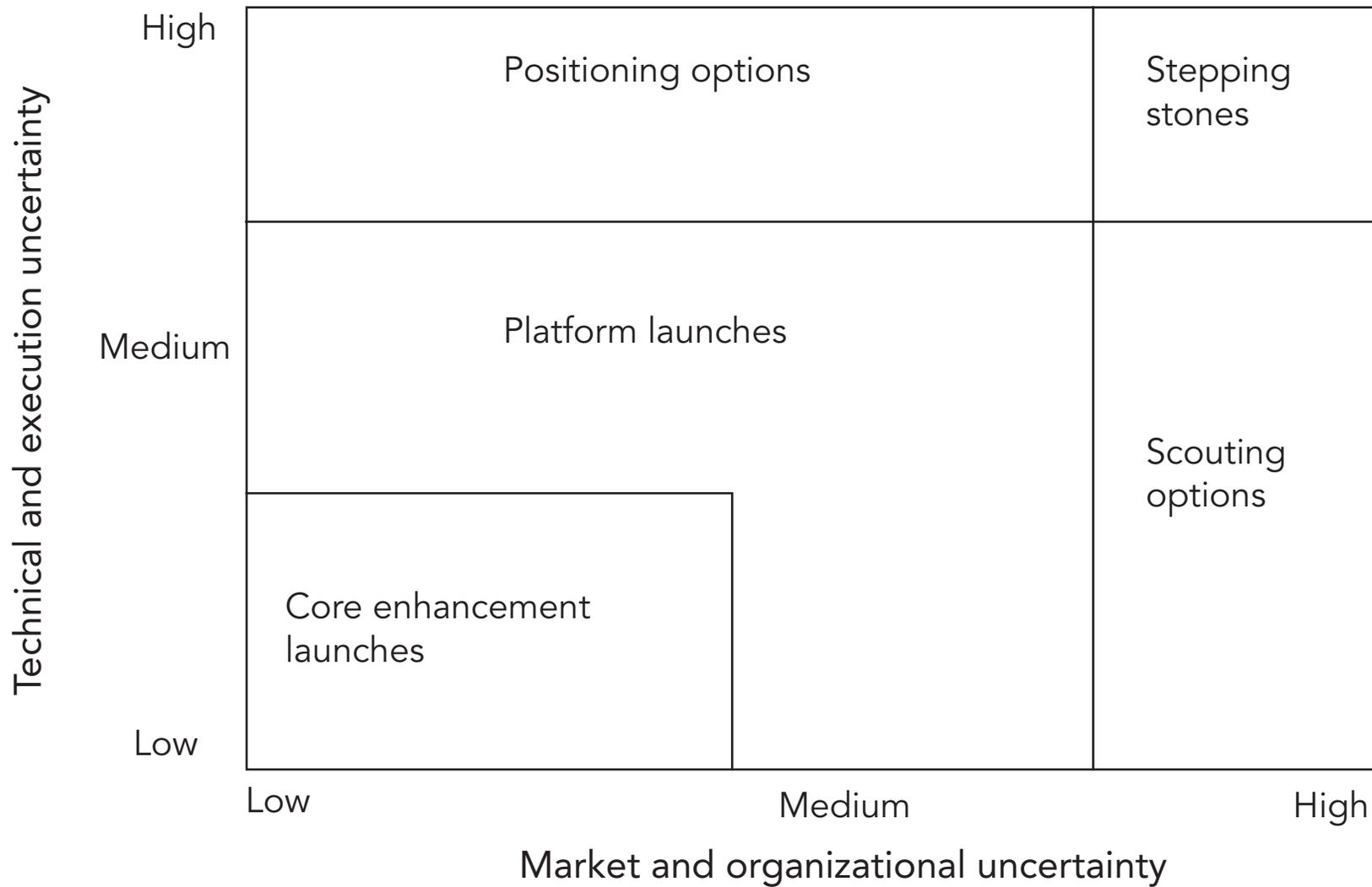
### **Resources and Examples of how MACPA engages volunteers from an outside-in perspective**

- What Are CPAs Thinking? Insights From our 2012 Town Hall Meetings  
<http://www.macpa.org/blog/3102/what-are-cpas-thinking-insights-from-our-2012-town-hall-meetings>
- Top Seven Issues Facing Young Professionals  
<http://www.macpa.org/blog/1541/top-7-issues-facing-young-professionals-and-what-we-are-doing-about-it>
- What Keeps CFOS and Finance Pros Up At Night  
<http://www.macpa.org/blog/1750/whats-keeping-cfos-finance-professionals-up-at-night>
- Top Seven Leadership Challenges Facing CPA Firms  
<http://www.macpa.org/blog/1779/top-seven-leadership-challenges-facing-cpa-firms>
- Want to Solve Your Generational Issues? Talk to Each Other  
<http://www.macpa.org/blog/3230/want%20to%20solve%20your%20generational%20issues-%20talk%20to%20each%20other>
- i2a: Insights to Action: A Strategic Thinking System  
<http://www.blionline.org/Content/Home.aspx#jumpto-menu1>
- Participation technology  
<http://www.conferences.io>

*Excerpted from "The Mission Driven Volunteer," white paper by Peggy Hoffman and Elizabeth Engel, available at <http://bit.ly/13Wwe1F>.*

# VISION ALIGNMENT GRID





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# GLOSSARY OF TERMS



DISCOVERY-DRIVEN GROWTH - A BREAKTHROUGH PROCESS TO REDUCE RISK & SEIZE OPPORTUNITY

By Rita Gunther McGrath & Ian C. MacMillan

## CORE ENHANCEMENT LAUNCHES

Core-enhancement launches are projects that improve the profit streams and growth of the core business. Although these launches may be highly innovative, they are building upon or enhancing a business with which your firm is already successful. (MCGRATH & MACMILLAN, 2009. P. 53)

## PLATFORM LAUNCHES

Platform launches are major initiatives, often requiring substantial investment, to establish your firm in a new growth area at scale. The goal of a platform project is, as the name suggests, establishing a platform for significant growth in future revenues and profits. (MCGRATH & MACMILLAN, 2009. P. 54-55)

## POSITIONING OPTIONS

Positioning options represent initiatives in areas in which your firm is fairly confident that a long-term customer demand exists. The unknowns might have to do with how that demand will be addressed. (MCGRATH & MACMILLAN, 2009. P. 58-59)

## SCOUTING OPTIONS

Scouting options are useful when you have a capability or technology that you think might have value to a set of customers, but you don't really know for sure. Scouting options are then used to experiment with different approaches to the business to find out which might work best. (MCGRATH & MACMILLAN, 2009. P. 60-61)

## STEPPING STONE OPTIONS

Stepping stone options represent the highest category of options, because the eventual capabilities or technologies needed are unknown, as are the eventual market demand, and the form it will take. A company invests in such stepping stone opportunities because it believes that the technologies or markets will be important in the future and it doesn't want to risk being left behind. (MCGRATH & MACMILLAN, 2009. P. 61-61)

# CREATING NEW VOLUNTEER OPPORTUNITIES: MENTORING PROGRAM

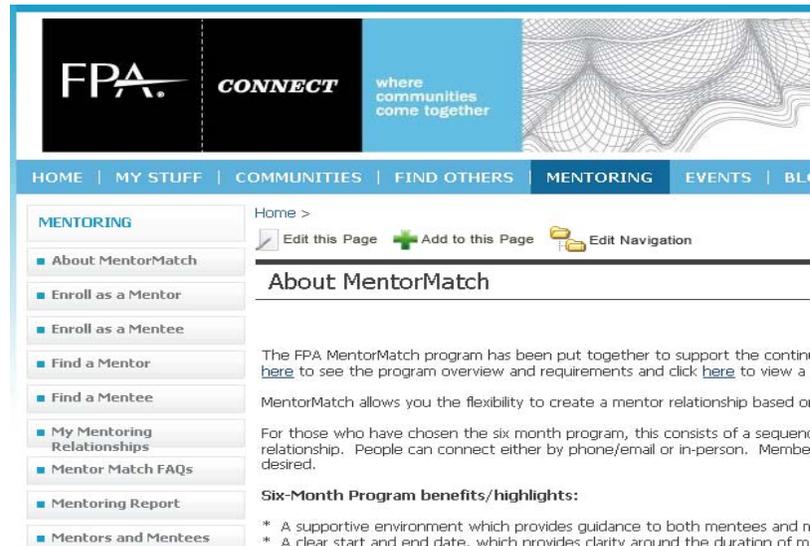
## *Financial Planning Association*

Laura Brook \* Director, Community Development \* [Laura.Brook@FPAnet.org](mailto:Laura.Brook@FPAnet.org)

### Introducing MentorMatch

#### HISTORY

- Grassroots evolution
  - Women & Finance community
  - Manual process
- Positive feedback = MentorMatch task force
- Launched MentorMatch in August 2012



#### STRUCTURE

- 6-month program
  - Starts quarterly: Sept, Jan, March, July
- Coach involvement
- 3 FPA-led calls:
  - Kick-off – mentors and mentees
  - 2-month check-in – mentors separate from mentees
  - Wrap-up: celebrating successes – mentors and mentees

#### REQUIREMENTS

- Meet one hour per month
- Mentee worksheets
  - to zero in on goals and strategic needs
  - sent to Mentor prior to first meeting/call

#### ROLES

- Mentors:
  - Lead the first call
    - Focused on discovery
    - worksheet provides background info and structure
  - Must be responsive and supportive
- Mentees:
  - Owners of the relationship
  - Set agenda a week in advance of meeting
  - Responsible for getting what they need from mentorship

## MARKETING

- All Member Open Forum
- 3 demo calls before start of initial MentorMatch
- Brochure and demos at annual conference
- Home page banner of our main site



## BUILDING ENGAGEMENT

- What we've done:
  - Defined structure
  - Set a limited time requirement
  - Natural sign up; runs 3 mentees to every mentor
- What we're working on:
  - Engaging chapters
  - Working with standard-setting body to get CE

## SUPPORT STRUCTURE

- FPA uses Higher Logic's Connected Community

## SUCSESSES

- For a short program, highly impactful
- 100% positive feedback to date
- Great way to increase membership engagement

## CONNECTING WITH MEETING PRESENCE

- Planning Mentor networking events at annual conference
- Opportunity to connect with a "conference buddy" to show a newer attendee the ropes
- Matching up attendees in study groups

**A NEW APPROACH TO VOLUNTEER REWARDS:  
A “FREQUENT FLIER” STYLE PROGRAM  
*Society of Petroleum Engineers***

Liz Messner, CAE, IOM \* Senior Manager Membership \* lmessner@spe.org

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**Inspiration**

Loyalty programs have been around for more than 100 years and are experiencing an enormous resurgence. Frequent-flier programs are among the best known— American Airlines is credited with launching the first in 1981— but companies began trying to win the hearts and minds of customers long before that. One of the early efforts to encourage customer loyalty was the S&H Green Stamps program, which began in the 1930s.<sup>1</sup>

The goal of creating and using a loyalty program is to interact with your customers, and create an intimate relationship with them. At their most successful, loyalty programs should make a customer feel special, and that they are having a unique experience with your company.

**Innovation**

SPE was looking to enhance existing volunteer appreciation practices. We assembled a team of volunteers to help design a frequent flier style program. The first big decision was to focus the rewards on recognition, access, privileges and other similar benefits rather than discounts, freebies and points redemption.

We wanted to create a program that would make the volunteer feel like a VIP, with prestige and status. The goal was to create a feeling similar to that of being able to board a plane before everyone else or being upgraded to a higher class of service.

**Development and Implementation**

An ad hoc task force of volunteers developed a volunteer recognition program, whereby members would earn increasing levels of recognition and privileges through continuous service. The task force believed strongly that to fulfill SPE’s mission, it is essential for members to participate and contribute to publications, conferences, technical discussions, etc. and give their time to local sections as well. The Volunteer Recognition Program offers SPE an opportunity to acknowledge member contributions and put emphasis on service to the society. Recently, the SPE Board identified volunteerism as one of the top two opportunities and threats facing the society. Volunteers generate intellectual property and serve and lead the society. Volunteerism is an important factor in succession planning for the society.

A list of volunteer opportunities was developed and each was assigned points; points would be cumulative over the lifetime of the member, and at each significant milestone, enhanced recognition would be offered. [Note: initial list of opportunities was driven by what data was accessible to our AMS; we have a wish list of opportunities to include once systems issues are overcome.]

In a separate project ongoing during the same time, SPE implemented a private social network for members only (disclosure: SPE uses Higher Logic’s Connected Community Platform). We were able to expand our volunteer opportunities list by adding engagement and micro-volunteering opportunities associated with the discussion forms.

SPE has taken a phased approach to implementation. Although our progress has been slowed by systems issues (IT is

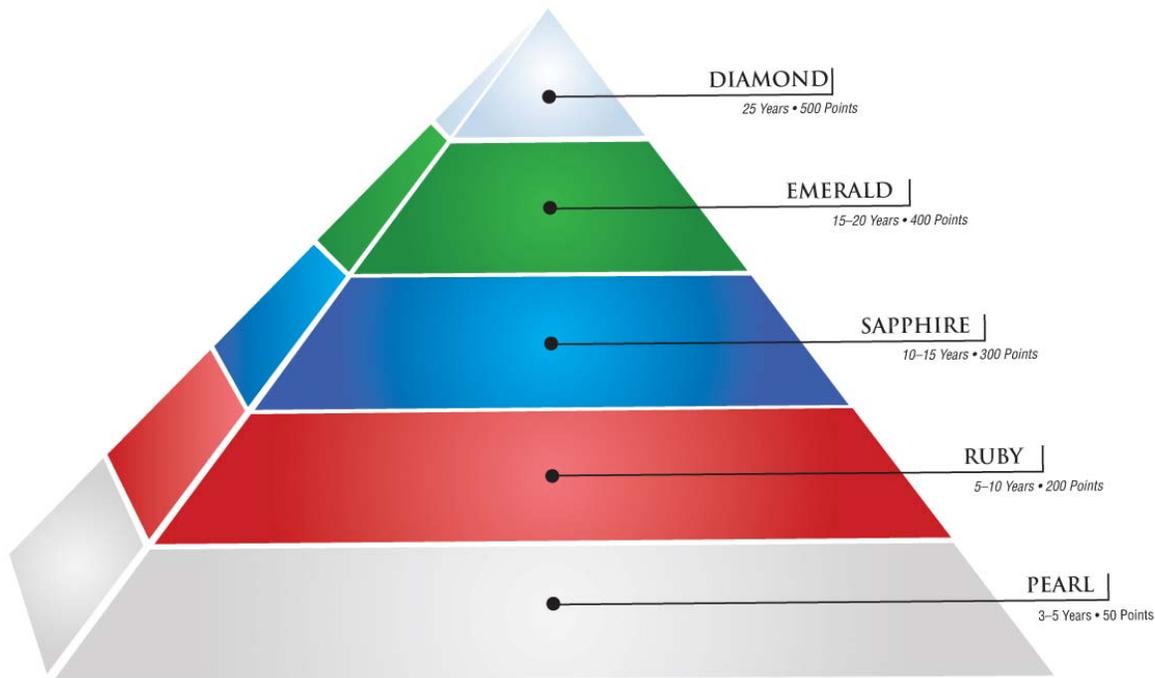
an important factor to success) we have a well-developed program and our initial roll out will only be a part of the full plan.

### Program Information

- Points will be earned over a lifetime of membership (assumes no change to member number or lapse in membership)
- Points will not be deducted when recognition is earned—points earned over a lifetime of membership
- Points will be tracked by volunteer year and lifetime
- Points are earned on the basis of a full term of service. If the member is very active or somewhat inactive they will earn the same points value. Full credit or zero credit are the only options at this time
- Students will be eligible to earn points
- A member must be current with dues to earn points and be recognized
- If the speaker or presenter is compensated by SPE he/she cannot earn points (Training Courses, etc.)
- Points earned for service on the Board of Directors would not be included until two years after the end of that service.
- “Volunteer Year” would run 1 September through 31 August; any recognition at ATCE would occur at the following year’s meeting.

Initial Pyramid: note-we’ve multiplied the points by a factor of 10 and adjusted the points related to each volunteer opportunity accordingly.

## VOLUNTEER RECOGNITION PROGRAM



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1. Joseph C. Nunes, “The Lowdown On Customer Loyalty Programs,” Forbes.com, Knowledge@Wharton, 1/02/2007, 2:30PM

# THE ROI OF VOLUNTEERS

## *The Aging Network's Volunteer Collaborative*

### *National Association of Area Agencies on Aging*

Tobi Johnson, Tobi Johnson & Associates  
 (206) 799-9038 \* [tjohnson@n4a.org](mailto:tjohnson@n4a.org) \* [tobi@tobjohnson.com](mailto:tobi@tobjohnson.com)

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THE AGING NETWORK'S VOLUNTEER COLLABORATIVE

*Engage the wisdom of age.*

BEGINNING | BUILDING | SUSTAINING | SHARING

**POWER UP!**

**WHAT ARE SELF-DIRECTED TEAMS?**

Teams of older adult volunteers can help your agency expand its services while freeing you to work on other projects.

[Learn more](#)

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• Now, vol

expandin

<http://agingnetworkvolunteercollaborative.org/>

[www.tobjohnson.com](http://www.tobjohnson.com)

• This site gives you the tools to tap this movement.

[Register](#) | [Forgot Password](#)

## Calculating Return on Investment

### Two Simple Ways to Calculate the Value of Volunteer Time

- **Independent Sector** – Value of a volunteer hour in the US is \$22.14.
  - [http://www.independentsector.org/volunteer\\_time](http://www.independentsector.org/volunteer_time)).
- **Points of Light/Hands on Network** – Overall value of all volunteer time calculated by job titles and total hours logged.
  - <http://www.handsonnetwork.org/tools/volunteercalculator>

$$C = \frac{P \times R}{4}$$

[www.tobjohnson.com](http://www.tobjohnson.com)

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## ▶ Calculating Return on Investment

### A More Complex Way to Calculate Value (Volunteer Value – Program Cost)

Program Cost

Caveat: This does not calculate the ROI for **volunteers themselves**.



## ▶ Limits of Return on Investment

### Difficult to Calculate Value of ...

- Increased Organizational Capacity
- Enhanced Services or Member Benefits
- Better Grant Performance
- Heightened Community Awareness
- Increased Consumer Protections
- Positive Changes in Individual Lives
  - ➔ Volunteers, clients, staff
- Other Benefits?

## Want to hear more?

Join one or all of our post-ASAE13 webinars, hosted by Higher Logic. They are all free and offered so we can keep talking! Each takes place 1pm ET and runs up to one hour.

**#1 – Sept 10: The IEEE Experiment** on shifting the volunteer paradigm with Marc Beebe, CAE, Director, Strategic Research

**#2 – Sept 24: The Maryland Association of CPAs Story** of reinventing the volunteer program with Tom Hood, Executive Director/CEO

**#3 – Oct 8: The Society of Petroleum Engineers new approach** to volunteer rewards with Liz Messner, CAE, SPE & Andy Steggles, CEO, Higher Logic

**#4 – Oct 22: The Aging Network's Volunteer Collaborative work** on finding the ROI of volunteer programs with Tobi Johnson, MA, CVA, Tobi Johnson & Associates

**#5 – Nov 12: Financial Planning Association's story** on creating new volunteer opportunities through a mentoring program with Laura Brook, Director of Community Development

**#6 – Nov 26: The New Volunteer:** a conversation led by the Executive Management Section Council sharing research, findings and case studies that create a new definition and new framework for successful volunteer management

For more information on the webinars, contact Peggy Hoffman, CAE, Mariner Management, [phoffman@marinermanagement.com](mailto:phoffman@marinermanagement.com), 301.725.2508.

Also, join the conversation and look for updates, details on these webinars and more on our ASAE Collaborate group ***Rebuilding The Volunteer Spirit***.