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EXECUTIVE SUMMARY

A Holistic Approach to Association Volunteer Management

How Associations Are Supporting—and Can Improve—Their Volunteer Management Systems

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Executive Summary

It can be a struggle to develop a mutually beneficial—and effective—volunteer system that helps achieve your organization's mission and meet member needs. The challenge persists; a new sense of urgency to improve how volunteers are managed has emerged, largely in response to universal disruptors like increased focus on diversity, equity, and inclusion and the demand to optimize governance.

This ASAE Research Foundation study looks beyond the systems currently in place to help associations begin a journey of defining the volunteer systems for tomorrow—for the workforce of today. Use these findings, recommendations, and information found in the detailed findings section of the full report as a resource to move forward on that journey.

“As association professionals, it is our job to make engaging with the association a positive, productive, impactful, and meaningful experience. Creating structures that make this possible requires intentionality, resources, strategy, and futures thinking. This report will help associations customize their approach and infrastructure to build mutually beneficial volunteer programs.”

— **Lindsay Currie, CAE**

Executive Officer

Council on Undergraduate Research

Observations and Insights

1 Associations generally do not have a single definition of effective volunteering and often determine success based on measurable outcomes and outputs rather than impact.

Observations

According to the data, association staff and volunteers view job execution, achievement of key goals, and meaningful participation as key indicators of effectiveness. Associations generally lack independent, objective metrics to assess success; this may lead to a difference seen in the perception of volunteer effectiveness between association staff and the volunteers themselves. For example, association staff rated less than one third (29 percent) of their volunteers as highly effective whereas volunteers rated nearly half (46 percent) of their colleague-volunteers highly effective. And tellingly, 44 percent of associations indicated that they would replace some volunteer roles with staff if they could.

Insights

Based on a literature review and results from this study, there is no one single definition of effective. The presence of a definition is needed to make the critical decisions about this mode of workforce. Associations should develop a valid, clearly defined purpose for the use of volunteers that fully aligns with the capacity of the volunteer pool to fulfill that purpose and for the association to support their effort.

2 Structure affects satisfaction and perceived effectiveness.

Observations

Overall, associations that implement many of the management features found to be strengths in the 2017 ASAE Research Foundation study *Mutually Beneficial Volunteerism*—and that are standards of human resource management—rated their volunteers more highly effective. This suggests that volunteer management success depends on clear models that provide a stable infrastructure. Additionally, several studies identified in the study's literature review supported a volunteer management approach based on universal practices from a human resource management model—specifically noting the correlation between volunteer satisfaction and a universally used management model.

Insights

An effective framework grounds an association's volunteer management into a holistic system that is mutually beneficial to the volunteer, the association, and ultimately the member. Such a system should have three key elements: (1) a valid, clearly defined purpose for the use of volunteers that fully aligns with the capacity of the volunteer pool to fulfill that purpose and for the association to support their effort; (2) volunteer job design that accurately reflects that purpose and capacity; and (3) an assessment process that offers an objective, valid, and reliable evaluation of volunteer performance. A key element of the system is a staff that is well-trained and supported in their work with volunteers.

3 Associations that formally assess some aspect of their volunteer system tend to employ more effective volunteer management features than those with no formal assessment.

Observations

More than half of association staff reported doing some level of formal assessment, more often evaluating groups (52 percent) rather than leaders (41 percent) or individuals (36 percent). There is, however, limited understanding by volunteers regarding use of evaluation results—nearly one third (31 percent) indicated that they are unsure how assessments aid decision making.

Insights

Though the mere mention of assessment and volunteers may cause discomfort, they do happen, even if only largely informal. Anecdotally, the reluctance to fully embrace assessment may be a combination of orthodoxies that volunteers don't want to be assessed and that it's simply inappropriate to assess them (i.e., “they give their time”). Additionally, it is difficult to conduct an assessment when there are no measurable metrics or a shared definition of effective. This particular area of volunteer management is still holding most associations back in creating effective volunteer systems: An association needs a definition of effective that allows for measuring impact and driving decisions on resource allocation and strategy to optimize volunteer effectiveness.

4 Associations and volunteers value diversity, equity, and inclusion (DEI), yet see mixed performance.

Observations

Volunteers rated choosing diverse volunteers (37 percent) as one of the top three most important elements of an association's system, just behind attracting the best people in the field (also 37 percent) and offering well-designed roles for meaningful contribution (51 percent). On performance, 62 percent of volunteers agreed that their organization chooses diverse volunteers, indicating some room for improvement, and more than half of staff indicated that having volunteers who are representative and diverse (56 percent) is a strength of their volunteer system. Additionally, just more than one in three (36 percent) of association staff respondents rated their organization's ability to identify and recruit an inclusive and diverse pool of volunteers either excellent or good.

Insights

The ASAE Research Foundation report *Are Association Boards Embracing Diversity?* addresses the issue in greater detail—largely reflecting that associations, while exhibiting positive signs of integrating effective elements of diversity, equity, and inclusion, have a significant opportunity to achieve greater DEI on their boards. This is much the situation down the volunteer pipeline. Associations should move beyond traditional recruiting practices that tend to favor familiarity over competence. Rather, they need to embrace practices, such as accountability and goal setting with metrics, and connect those practices to goals and, ultimately, to the association's financial commitment to its volunteer system.

5 The volunteer spirit is alive and thriving.

Observations

Volunteers are active in their respective associations, and overall, they are satisfied with their volunteer management system (73 percent), rating most volunteers as highly effective (46 percent) and indicating that they are very likely to remain a volunteer for the organization over the next several years (54 percent). Most (62 percent) recommend volunteering to a friend or colleague. Likewise, volunteers indicated that the major disruption caused by the COVID-19 pandemic had no effect on key aspects of their volunteer participation. Overall, volunteerism is strong, with association staff reporting that the total number of volunteers over the past five years (2017–2021) has increased (41 percent) or remained stable (37 percent).

Insights

The shift in volunteering is nuanced. According to the data, the shift is less the number of volunteers available to associations and more the number of hours they are willing to provide. Most are looking at the commitment and emphasizing that their strong preference is to be in a job that suits their skills and have a meaningful experience.

Recommendations

1 Adopt a framework that employs the characteristics of excellence for an effective volunteer model.

These principles support and sustain mutually beneficial volunteer involvement in the mission and work of associations and are seen in associations that generally rate their volunteers as effective. Consider the following characteristics to support and sustain your volunteer management system:

- An organizational culture of volunteerism
- Clarity of purpose and definition of high performing
- Holistic and transparent volunteer system infrastructure
- Commitment to continuous improvement
- Professional development
- Staff readiness and preparedness
- Information and knowledge transfer
- Anticipatory capabilities and responsiveness
- Resource commitment
- Community focus
- Strong identification and connection to the profession or trade

2 Systematically define and develop an effective volunteer model for your organization using a process model.

An example is outlined in greater detail in the full report. By walking through a systematic process, you can fully assess your current model, set goals, and identify areas for improvement.

3 Establish objective metrics for your volunteer system; consider using the Volunteer Impact Framework—A Model for Viewing Effectiveness.

While the research makes the case for defining relevant metrics for an association's volunteer system, it does not, however, specify metrics. The related Volunteer Impact Template is designed to provide examples of desired outcomes and potential metrics for measuring achievement of those outcomes. The template is outlined in greater detail in the full report.