

Making the Volunteer Investment

Is it possible that an association might ignore or undervalue the contributions of its volunteers? Is it possible that an association might not know how to attract and retain volunteers? Well, look out! Your association might be neglecting its most valuable resource. Volunteerism builds commitment and enthusiasm within an association's membership base, and with a little bit of direction, great things get done. Happy volunteers make good members and good members are happy volunteers.

So you're interested, and want to know more about how to maximize volunteer contribution and effectiveness. Naturally, the simplest thing to do would be to look to your Volunteer Management Program for advice, right? Oh, you don't have one? Don't worry – you're not alone. It is rare to find an association that has a formal volunteer management program. This article will discuss the value of having a formal volunteer management program, and will look at the case of the Canadian Institute of Actuaries to see what it has done to make *the volunteer investment*.

The Canadian Institute of Actuaries (CIA) is the national organization of the actuarial profession in Canada. The Institute promotes the advancement of actuarial science and sponsors programs for the education and qualification of members and prospective members. It maintains programs to ensure that actuarial services provided by its members meet accepted professional standards. The Institute also provides services to actuaries in Canada to assist them in the discharge of their professional responsibilities.

Like most associations, CIA has some volunteer challenges. In recent years, there were some concerns about the number and types of volunteers, the distribution of work, timeliness and the range of activities. Some considered the number of volunteers insufficient, with the result that a number of key members assumed an inordinate share of the work. The distribution of volunteers from across the profession has also been an issue. To maintain a strong profession and to ensure quality, it is important that volunteer activities represent all parts of the profession, all practice areas and all geographical areas.

It is equally important that opportunities be made available to all those who wish to volunteer and to participate, and that all input be recognized and welcomed. Any barriers to more active participation and perceived inequities must be addressed and eliminated. At the same time, individuals who volunteer must be prepared to dedicate the time required to meet expectations and make a good contribution to the initiative.

Barriers to Successful Volunteer Operations

- Lack of policy
- Uncertainty in roles, responsibilities and length of service
- Appearance of lack of equal access
- Volunteers who offer but, are never acknowledged or asked to participate
- Costs to volunteer, such as travel
- Many volunteers from the Toronto area and limited representation from other areas
- Lack of employer support and/or discouraging participation
- Limited recognition provided to those who volunteer
- Lack of communication regarding the process of volunteering, opportunities available, expectations for volunteer commitments, performance management
- Volunteer training is limited or non-existent

Historically, the CIA has enjoyed the benefits of many dedicated volunteers. Nevertheless, to continue with the CIA's initiatives, to successfully pursue new challenges, and to enhance the development of the profession in Canada and abroad, a stronger network of committed volunteers was needed. Many of the profession's activities, and the development of the profession itself, depend on a strong network of committed volunteers. With the relatively small size of the profession and the limited paid resources and funds available, an effective system to manage the volunteer resources of the profession was critical. Sound familiar?

CIA is on the fast track to becoming a high performance association and its Strategic Plan identified a strategy to establish a volunteer management system to assist with identification, education/orientation, matching of interests and provisions for fair and representative placement of volunteers. CIA President, David Oakden of Tillinghast - Towers Perrin, states, "CIA has over 300 volunteers and they are crucial to the success of CIA and a formal process is required to ensure focus and involvement is directed in a most productive fashion. The process allows us to put willing volunteers to work as soon as possible, identify high performance volunteers to maximize contributions, and recognize contributions."

A Task Force was established to pursue the strategy. The Task Force reviewed the current volunteer policies and practices and the profile of current volunteers. A review of best practices by other organizations was undertaken. The Task Force invited input and comments from all members and an article on volunteer issues was published in the CIA Bulletin which invited feedback and comment from members.

Goals for the Management of the CIA's Volunteer Resources

- Development and maintenance of a volunteer management policy, detailed plan and supportive system
- An increase in the number of volunteers and the level of participation
- More effective participation of members
- A fair volunteer selection process, providing opportunities to all

- A matching of member interests to volunteer activities
- An education/orientation process to assist members as they progress through their volunteer efforts.
- Equitable representation of all parts of the profession, including all practice areas, all geographic areas, all years since Fellowship, all types of employers
- Clear expectations for volunteers
- Enhanced measurement and recognition of volunteer efforts
- A useful database on members and their volunteer activities

The CIA recognized that a good volunteer management program contains the elements of *representation*, *recruitment* and the *recognition and rewarding* of volunteers. Based on these three elements, the components of the volunteer management plan were developed. These components led the CIA to:

1. Establish, maintain, and communicate a Volunteer Management Policy for the management and practice of volunteer resources;
2. Appoint a Director of Volunteer Issues who is a member of the Board and whose primary role is to manage volunteer issues;
3. Develop and maintain a Volunteer Management System that includes a database of volunteer activity, training and communication materials, a volunteer award program, guidelines for volunteer commitments and a communication program with employers; and;
4. Establish and communicate volunteering expectations to members.

The Task Force developed a volunteer management policy that covers:

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| ▪ Promotion of Volunteerism | ▪ Minutes of Meetings |
| ▪ Council, Committee and Task Force Staffing | ▪ Planning, Priority Setting and Meetings |
| ▪ Terms of Office | ▪ Expense Reimbursement for Volunteers |
| ▪ Balanced Representation | ▪ Liability Insurance and Legal Counsel |
| ▪ Effective Management of Councils, Committees and Task Forces | ▪ Recognition of Volunteers |

A job description was developed for the Board Director responsible for Board Volunteer Management Policy. The duties of the Director include:

- Overseeing an effective volunteer management policy system and procedures
- Identifying and acting upon emerging volunteer ideas and issues
- Effective use of the volunteer management registry
- Monitoring CIA volunteer practices
- Promoting and facilitating volunteerism with the CIA

A volunteer Management System to support policy was established. The system provides practices to support:

- Identification of volunteer needs
- Budgets and volunteer allocations
- Tracking and reporting
- Identification and attraction of volunteers
- Matching interest
- Access
- Volunteer orientation
- Volunteer education
- Policy and financial support
- Meetings
- Volunteer recognition
- Evaluation
- Rewards

The Volunteer Management Program, including policy and the supportive system are maintained in a binder. It contains all the relevant practices, sample letters, volunteer interest survey, notice of volunteer issues, reports, volunteer leader package, a booklet on how to get involved, and other supportive material.

According to the Chair of the Task Force, Nancy Yake of Watson Wyatt, "A volunteer management program will be most effective if it is designed by volunteers, for volunteers. It is essential that the culture and standards of the group be reflected in the details of the program." She further states that, "A formal volunteer management program will help our profession better meet its expanding goals. With a program in place, we anticipate that our Members will find their volunteer experiences more rewarding, and that the CIA will see enhanced value from the volunteer efforts."

Volunteer Management Program Considerations

If members are not volunteering, the problem might be rectified with a change in volunteer management practices. A lack of communication regarding the process of volunteering and the opportunities available might be preventing a member from volunteering. That is why a formal Volunteer Management Program is necessary. The expectation for volunteer commitments can be communicated to members, who can then look to the system and see what they need to do to help.

Furthermore, volunteers can see what resources are available to them. The cost of volunteering can be significant to some because of work commitments or geographical location. In the formal volunteer management policy, a section on the compensation of exceptional costs should be included. Some employers do not encourage participation. Formal communication from the Association to the employer, explaining the association and its purpose might prove beneficial in the long run. You have the opportunity to turn an opponent into a supporter, and possibly a sponsor. Finally, it might be possible that members do not want to volunteer because they don't know how to do the job. The association should offer volunteer training if necessary.

When you have volunteers, what are you going to do with them? Make sure that the expectations you set for your members will meet the needs of the association. This will prevent the problem of having members who offer to volunteer being ignored.

It is all well and good to have a large group of your members volunteering, but if they are not working towards a common goal, or their contributions do not help out the bigger picture, their efforts might be viewed as useless. That leads to member disappointment. The CIA realized that the integration of volunteer activities was critical. Communicating the association's expectations of its members is important, but members also have expectations of how their efforts are benefiting the association. The Director for Volunteer Issues acts as the voice of their praise and their concerns. Volunteers need a voice that can raise their issues and solve problems.

Volunteer guidelines must be consistently applied across all committees and working groups. One of these guidelines should be the matter of volunteer rotation. Volunteers must be rotated regularly, so that the same volunteers do not get left doing the same jobs. This situation leads to the formation of an "old guard" and hinders innovation. Likewise, the position of Director of Volunteer Issues should have a regular rotation.

Ask your volunteers why they are doing the work that they do. They might give you an insight into what other volunteers might want. So get to know your volunteers. Many of them are involved for professional development; many of them are involved just to meet other interesting people.

Keep track of who is volunteering, what they have done, when they did it, where they did it, how long they did it and how much they did. By keeping a database, you can track what proportion of your members are volunteering, and measure your association's success in attracting new volunteers. You can also use it to match volunteer interests with association requirements.

A well-maintained volunteer database allows you to call on skilled volunteers when you are in a bind, but more importantly, it provides you with a tool that lets you know who to reward for their efforts, because after the volunteers are happily working away, it is essential that regular and formal recognition be given. A simple pat on the back is nice in day-to-day operations, but remember that these people are investing their time and effort and are receiving no compensation in return.

Recognize and reward your volunteers. All of them. Reward them in a formal ceremony with dinner or at a conference, with a tangible gift for their efforts. Get creative, but do it in front of the volunteer's peers, and let the volunteer's employer know about it. Public recognition is not only the most rewarding means of thanks, it is also the means that will encourage other volunteering members to work harder, and non-volunteering members to get involved.

While the policy and program has only been implemented recently, it has paved the way to ensure volunteers representing all key segments of the membership are available to support future strategic initiatives and are appreciated. How will CIA measure success of the policy and program? They will measure levels of involvement and satisfaction. What percentage of *your* association's members are volunteers? How many are satisfied with the volunteer experience? Maybe it's time to make *the volunteer investment*.

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