Training and Development for Volunteer-Managers:

A Review of Best Practices in Volunteer-Management and

Application to Fundraising Staff at McGill University

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Abstract

This study sought to understand the core principles of an effective volunteer-management program, uncover the current and desired state of the volunteer-management program in McGill Development and Alumni Relations (DAR), and propose a comprehensive training and development program to address gaps in the current and desired states. A review of the literature on volunteer-management was first undertaken to form a foundation for the assessment and planning in the latter portions of the paper. In order to assess the current state of volunteer-management in DAR all staff with a fundraising mandate were asked to complete a questionnaire, with a particular focus on their volunteer-management beliefs, knowledge and skills, as well as the support they have available to them for these activities. This was followed by a focus group with fundraising staff of varying levels of experience in volunteer management and was complemented by a consultation with DAR senior management. Learning objectives were defined based on this investigation and a training program proposal developed in an effort to fulfill these educational outcomes. The training program incorporates different training formats ranging from lecture-style to workshop and is accompanied by a proposed implementation schedule.

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In the field of development, volunteers have been and continue to be effectively engaged

to promote the interests of nonprofit institutions. There are a great many definitions of a

volunteer, as cited by Machin and Paine (2008), Lynch and Smith (2010), Rochester (2006),

Safrit and Schmiesing (2012), Waikayi, Fearon, Morris, and McLaughlin (2012), and others. It

is generally agreed to (a) involve an active contribution of skills or time but not money or goods;

(b) be undertaken out of an individual's own free will; (c) not involve any material gain for the

volunteer; and (d) be of benefit to others or the environment.

The McGill Development and Alumni Relations (DAR) office has historically engaged

volunteers in a variety of committees and roles and continues to do so. Being a decentralized

office, with fundraisers residing in or assigned to 11 faculties, in addition to Libraries and

Continuing Education, those fundraisers managing volunteers in their respective units have done

so inconsistently with some achieving great results and others struggling, in some cases putting a

strain on previously positive relationships.

In 2010, the Office of Volunteer Partnerships was created in DAR at McGill. This office

consists primarily of one experienced professional with a great depth of knowledge on volunteer

management. In the Volunteer Partnerships Strategic Plan, the goals of the office are

contextualized within the overall objectives of the University:

As the University seeks to be a best practice operation in development and alumni

relations and to promote sustainable philanthropy, it wishes to invest in a strategic

professional program to engage volunteers in the advancement of the University and to

foster ownership for McGill's priorities. (McGill Development and Alumni Relations,

2012, p. 3).

In a 2011 survey conducted by the Office of Volunteer Partnerships at McGill, there was

found to be "limited staff and management, skills and tools for working with volunteers in

substantive ways" (Govain & Crowly, 2011, p. 10). As such, one of the six broad summary

recommendations resulting from the study was to invest in ongoing training programs and one of

the priorities of the Office of Volunteer Partnerships, as per the 2012 Strategic Plan, is to provide

fundraising staff with training to build their ability to undertake volunteer-management activities

(McGill Development and Alumni Relations, 2012, p. 3). Safrit and Schmiesing (2012) defined

volunteer management as "the systematic and logical process of working with and through

volunteers to achieve an organization's objectives in an ever-changing environment" (p. 6).

In an effort to address the training and development needs of McGill DAR fundraising

staff as they pertain to volunteer management, I will partner with the Office of Volunteer

Partnerships to undertake a review of best practices in volunteer management, an assessment of

the current and ideal state of the program at DAR, and propose recommendations for a

comprehensive training and development program. This project was approved by the McGill

University Research Ethics Board, and issue Certificate Number 250-1212. It is expected that a

successfully implemented and adopted training and development program will not only bolster

the volunteer-management capacity at DAR but will also have the additional benefits of

promoting better relationships between the University and the volunteers that support McGill's

mission, and increasing the positive outcomes associated with engaging volunteers. The

following questions will guide this work:

1. What is the current state of volunteer management in McGill Development and Alumni

    Relations (DAR)?

2. What is the desired state of volunteer management in DAR, from the perspective of both the

    fundraisers undertaking the task, and from senior management?

3. What professional development, training, support, and tools should be put in place to address

    the gap between the current and desired state of volunteer management in DAR?

   Before delving into an assessment of the volunteer-management program in DAR, a

thorough understanding of volunteer management is undertaken. This begins with a review of

the benefits that volunteers bring to a nonprofit institution, then identifies multiple models of

volunteer-management and its essential components, and finally explores the characteristics of

an effective volunteer-manager.

Literature Review

   What value do volunteers bring to a nonprofit institution? Is the task of strategically and

thoughtfully engaging them with an organization worth the reward? According to *Measuring*

volunteering: A Practical toolkit, published in 2001 for the International Year of Volunteers,

volunteering in the nonprofit sector in the USA is equivalent to approximately nine million jobs

(Dingle, Sokolowski, Saxon-Harrold, Smith & Leigh, 2001, p. 7). Here in Canada, "in 2010, a

force of 13.3 million Canadians over the age of 15 participated in volunteering, an increase of

more than 800,000 since 2007. These Canadians contributed 2.1 billion total volunteer hours

(Volunteer Canada, 2012). This represents a large available work force that is willing to

contribute time and skills with no expectation of monetary or material reward. Eisner, Grimm,

Maynard and Washburn (2009) list several services volunteers can provide including

"technology services, developing programs, training staff, and conducting strategic planning, all

without being paid a salary" (p. 34). With regard to governance boards in particular, Brown

(2007) explained that volunteers "can bring key resources such as knowledge, skills,

relationships, and money, that strengthen the organization" (p. 302).

Volunteers in an organization such as McGill Development and Alumni Relations have

great potential to positively impact fundraising efforts. According to Eisner et al. (2009),

"volunteers are more effective fundraisers because their personal commitment to the

organization's mission makes them convincing advocates for the cause. In addition, volunteers

are likely to donate to the organization at which they serve" (p. 34). Not only can volunteers

bolster and support paid fundraising staff by soliciting donations, but they also often supplement

their gift of time with financial support of the institution.

A Professional Approach to Volunteer Management

There exists a debate in the field of volunteer management as to whether or not its

professionalization–in terms of the development of formal policies and practices in the

management of volunteers–is of benefit to an institution's volunteer program. Eisner et al.

(2009) dubbed the professionalization of the field to be a "talent management approach –

investing in the infrastructure to recruit, develop, place, recognize, and retain volunteer talent" (p. 34). Similarly, Haski-Leventhal (2009) described professional volunteer management as the application of "managerial processes (such as recruitment, selection and motivating) in order to retain people who give their time freely to help the organization achieve its cause" (p. 2).

Although the literature decidedly rules in favor of the professional approach, authors do acknowledge the voice and rationale of critics. Lynch and Smith (2010) explained the concern that "the new management culture imported from the paid workforce is inappropriate and at odds with the culture and values of volunteering" (p. 82). Those with apprehension toward professionalization believe that it will be detrimental to the volunteer experience and that volunteers don't want to be managed. Their stance is that volunteering is a leisure activity and as such "volunteers may be hostile to efforts to introduce procedures that treat them more like unpaid employees" (Holmes, 2004, p. 76). This concern, however seems to be unfounded. Holmes (2004), in her investigation of six nonprofits in the heritage and museum sector in England and Wales, discovered that the professionalization of volunteer management does not adversely affect volunteer motivation and experience. She explained, "managers may consider the volunteers to be fulfilling a service delivery function and the volunteers may consider themselves to be in a leisure activity, but these do not represent irreconcilable viewpoints" (p. 88).

Several authors support the view that professional volunteer-management practices must be consistently employed in order to effectively employ volunteers. Referencing an analysis of data from the 2005-2007 *Volunteer Supplement to the Current Population Survey* (USA), Eisner

et al. (2009), cited poor volunteer-management as the primary reason that "nonprofits are losing staggering numbers of volunteers each year. Of the 61.2 million people who volunteered [in the USA] in 2006, 21.7 million – or more than one-third – did not donate any time to a charitable cause the following year" (p. 32). Rochester (2006) also asserted that instead of being a detriment to it, a professional approach to volunteer management would improve the volunteer experience through the "dissemination of good practice, and by the use of quality standards" (p. 31). Lynch and Smith (2010) agreed with this assessment and, having conducted research in the cultural sector in the UK through both qualitative interviews and surveys, surmised "that without solid foundations, built during the recruitment and selection process, the expectations of volunteers in this study could be compromised, which might lead to problems in subsequent commitment and performance" (p. 92). They further anticipated mismatched volunteer expectations and poor working relationships to be consequences of informal volunteer-management (pp. 91-92).

Volunteer-management policies not only have the potential to improve the volunteer experience but Hager and Brudney (2004a) also found it increased the benefits to the organization employing the volunteers (p. 10). Waikayi et al. (2012) highlighted the importance of effective volunteer-management strategies in the wake of the credit crunch, and subsequent downturn in volunteering, in order to retain existing volunteers. Additionally, Safrit and Schmiesing (2012) cited the increasingly fast pace of change as a driver for the development of volunteer policies and systems, asserting that this would better utilize the limited time the volunteer and the volunteer manager have to give.

Although these authors present the argument in different ways, the common theme is that volunteer-management practices have the potential to impact the volunteer experience and the volunteer's ability to successfully carry out their mandate. Ultimately, volunteers who are happy with their experiences and feel supported and able to fulfill their job descriptions, will be more likely to remain a volunteer at a particular organization than someone who is dissatisfied. Dwiggins-Beeler, Spitzberg, and Roesch (2011) reviewed the literature, citing several authors, and explained "the outcome of satisfaction is the intent to remain with the organization to the degree that the volunteer's needs are perceived to be met" (p. 28). The results of their own survey of 150 long-term volunteers for a nonprofit in Southern California (45 participants), in which they administered a pre-existing *Volunteer Satisfaction Index* instrument, supported this statement. The findings confirmed that satisfaction and retention are positively related, but also that satisfied volunteers become recruiters themselves, bringing new volunteers to the organization (Dwiggins-Beeler et al., 2011, p. 38).

Hager and Brudney (2004b) recognized that retention is a goal and measure of success of volunteer programs and continued to explain "recruiting volunteers is an expensive and time-consuming job, so charities generally like to maximize retention. Retention is also important because volunteers often become loyal financial donors to the organization as well" (p. 9). Hager and Brudney (2004b) supplied specific aspects of volunteer-management that have the greatest capacity to increase retention. These are described more fully in the sections below.

Key Components of a Volunteer-Management Program

Once it has been established that a volunteer-management program is essential to the

successful employment and retention of volunteers, the next question becomes what are the

elements of such a program? Although many authors have proposed their own essential

ingredients to an effective volunteer-management program, there is consistency in the

recommendations. Safrit and Schmiesing (2012) provided a history of volunteer-management

frameworks dating back to Harriett Naylor's 1967 work outlining components of a plan to

develop volunteer leadership, without actually terming it volunteer-management. Even at this

early stage of the development of the field, job descriptions, recruitment plans, orientation, and

succession planning all factored into Naylor's framework.

Safrit and Schmiesing (2012) also cited Boyce who in 1971 introduced a framework for

the volunteer-management profession using several of Naylor's original concepts. To her initial

constructs, Boyce added utilization, recognition, and evaluation. The discipline continued to

develop and in 1990 Brudney introduced some programmatic components including

organizational structure, employee buy-in, and the hiring of a director of volunteer services.

Although Safrit and Schmiesing (2012) referenced several other authors and frameworks they

also acknowledged "it could be argued that, to a degree, all of the models discussed are basically

the same, with the only differences being the words used to describe a specific component or that

some components are embedded within others" (p. 16).

Individual organizations would perhaps be wise to adapt the best practices cited in the

literature to their specific needs. Machin and Paine (2008) explained, "there is no one model of

volunteer management and no one way of developing and implementing good practice. Further,

what works for one organization may not work for another" (p. 8). For example, 4-H, an

organization that relies heavily on volunteers, developed the SERVE Model for Volunteer

Administration to emphasize the partnership between volunteers and volunteer administrators

and to provide opportunities for flexibility and learning (Whitson, 2008). Although SERVE

touches on elements such as recruitment, orientation, and evaluation that are common in the

literature it does so in a way that is unique to 4-H in that it is grouped by stages that do not have

to be approached sequentially.

The following section outlines several common themes in the development of a

professional volunteer-management program and their importance to the overall volunteer

experience. As described above, if volunteers have a positive experience they are more likely to

continue to volunteer and contribute positively to an organization. Although the goal of this

research is not to specifically address improvements to the volunteer-management infrastructure

in DAR, it does aim to improve the volunteer experience, retention, and other positive outcomes

associated with having a fulfilled volunteer workforce. Therefore, it is important to lay the

foundation for a basic understanding of these processes, which will certainly be major themes in

a training and development program for volunteer-managers.

Job descriptions. Before embarking on recruitment of volunteers it is important for an

organization to understand their needs. Lynch and Smith (2010) emphasized the development of

job descriptions as essential to effective recruitment, outlined below. Brudney (2000) furthered

this line of thought in asserting that without an assessment of volunteer needs, including job

descriptions, "recruitment, training, management, and evaluation of unpaid workers are nearly hopeless tasks" (p. 238).

Lynch and Smith (2010) found there to be varying levels of formality in the development of job descriptions across the 12 UK cultural sector organizations that participated in their study. Some institutions opted for very conventional job descriptions, similar to those developed for paid workers, while others wrote a description of duties into their volunteer welcome letter and yet others relied on in-person, verbal communication of the needs of the job (p. 86). The SERVE Model, developed by 4-H, proposes that position descriptions be developed jointly by volunteers and volunteer-administrators (Whitson, 2008).

The ultimate purpose of a job description is to provide clarity and as such it should include specific information about what is being requested of the volunteer. According to Haski-Leventhal (2009), a good job description includes tasks, mission and goals, and a goal-setting procedure (p. 5). It is unclear how they came to this conclusion, as it is not directly sourced, however given their extensive reference list, I assume it is based on a review of the literature. Further, based on a long career in fundraising and volunteer management, including consulting on the subject for many years, Govain (2009) added statements of purpose, role protocols, expectations, timeframe, and staff support to the list of required components of a job description (p. 6).

Recruitment. Recruitment involves "identifying, attracting and choosing suitable people to meet an organization's employee resourcing requirements" (Lynch & Smith, 2010, p. 82). Lynch and Smith (2010), through interviews and surveys of UK cultural-sector managers and

volunteers, also identified two primary barriers to recruitment: not enough volunteers, and not enough qualified volunteers.

There are many ways to go about recruiting volunteers. Govain (2009) emphasized that recruitment must be a strategic and professional process, involving thorough and careful planning, that is analogous to human resources planning (p. 15). 4-H suggests leveraging existing volunteers in this effort by seeking their recommendations or even asking them to carry out face-to-face recruitment (Whitson, 2008). Lynch and Smith (2010) explained that many institutions tend to rely on word of mouth. Additionally, Govain (2009) suggested identifying candidates through thorough research, curriculum vitae, and reference review, and further proposed the organizational context be considered through the use of a strategic "grid" for purposes of planning and profiling (p. 15).

Most authors propose a separate selection process within the recruitment drive. If a call for volunteers is put forth not all potential candidates may have the requisite skills to fulfill the volunteer job description. Haski-Leventhal (2009) affirmed, "effective selection processes can assure long term retention of volunteers, less turnover, and thus a stronger and a more efficient organization for the benefit of everyone" (p. 4). She further asserted that employing volunteers unsuited to the positions they are meant to fill is doing a disservice to the population that an organization is mean to serve. Whitson (2008) explained that those who wish to volunteer for 4-H must fill out an application, participate in an interview, attend an orientation, and provide references before they are accepted. Conversely, in their review of the literature on the field of volunteering generally, Lynch and Smith (2010) stated that commonly "a volunteer's interview

may be a very informal undertaking and the applicant may not even realize they are being

interviewed" (p. 84). In their own analysis of 12 cultural sector organizations in the UK, they

found that although formal interviews were not standard practice across all the institutions, face-

to-face meetings of some kind were commonplace.

Lynch and Smith (2010) explained that selection should be based on a well-defined job

description but also acknowledged that, at times, recruitment of volunteers is undertaken in

reverse of how it is done for paid workers. Based on a 2003 national systemic study of 3,000 US

charitable organizations, Hager and Brudney (2004b) found that matching volunteers with

appropriate jobs or tasks was essential to volunteer retention. However, selection, and

potentially rejection, of volunteers can be difficult for managers, as the volunteer is seen as

offering up their time as a gift (Haski-Leventhal, 2009, p. 4). When volunteers make themselves

available to an organization, and the volunteer-manager lacks the skills or tools to apply a

predetermined selection criterion (i.e., a job description), he or she may instead assign them to a

less than suitable position. In these cases, instead of the organization defining the needs of a

position and recruiting for it, it takes the characteristics of the individual volunteer and tries to

identify a position that will be a good fit for him or her. Attempting to adapt a volunteer position

to the needs and skills of a volunteer is not only challenging but also potentially detrimental to

the volunteer experience.

Orientation and training. Haski-Leventhal (2009) described training and organizational

socialization as "a critical process since it assures retention of organizational culture, values and

norms, allows the newcomer to cope with their new surrounds and increases the emotional

commitment to the organization and the role" (p. 4). Additionally, the British Red Cross sees

training "as a central element of volunteer retention" (Waikayi et al., 2012, p. 362).

Training is widely recognized as essential to a positive volunteer experience and

volunteer retention. Several studies have found evidence of this and three such examples are

cited here. Cuskelly, Taylor, Hoye, and Darcy (2006) surveyed primarily lead volunteers from

375 Australian Rugby Clubs and conducted 16 focus groups with the administrators of the

groups. Gaskin (2003) held three focus groups of 26 volunteers with a large variety of volunteer

experiences in the UK, basing their findings on this first-hand research and a review of the

literature. Hager and Brudney (2004b) conducted phone interviews with volunteer

administrators or executive managers at 3000 US charitable organizations with reported annual

receipts of more than $25,000. These authors–representing populations in Australia, the UK, and

the US, offering reports from both volunteers and administrators, and drawing from differing

types of organizations–all found that with greater use of training, organizations benefited from

improved volunteer retention.

There is broad support for volunteer training in a variety of forms. In reference to their

program at 4-H, Whitson (2008) suggested that the volunteer should have access to resources

such as lesson plans, books, seminars, and conferences.   The American Cancer Society pushes

training of volunteers even further, training them alongside paid staff. "Their chief talent officer

ensures that staff and volunteers participate together in orientation and training classes and work

together on important projects" (Eisner et al., 2009, p. 36). Brudney (2000) in his analysis

identified three components of volunteer training: orientation for all new volunteers (to introduce

to the organization, its culture, mission, and values), job-specific training (to develop skills and

knowledge), and ongoing in-service training (to alleviate boredom, burnout, and turnover) (p.

238-239). Of these, Brown (2007) emphasized the importance of job-specific training stating,

"the more relevant that training is to task requirements, the more likely it will improve

performance of individual position holders" (p. 304).

     Development and career-tracking. Planning for the professional development of an

institution's volunteers, and their progression through various volunteer roles, is a key

component of ensuring their overall satisfaction with the experience and the institution's ability

to maintain enough volunteers to successfully staff their program. Dwiggins-Beeler et al. (2011)

wrote "career development is motivating and . . . workers are satisfied because they benefit by

acquiring new skills and becoming better prepared to make and communicate decisions" (p. 27).

Brudney (2000) and Gaskin (2003) suggested that one way of accomplishing this is by

appointing volunteers to volunteer-management positions, in the place of paid staff (p. 18). This

serves two purposes: providing a career-track for more experienced volunteers, keeping them

fulfilled and engaged, and providing other volunteers with a manager that can relate personally

to their unique needs.

     Allowing volunteers the opportunity to take on more advanced volunteer roles is of

particular importance to retention. Eisner et al. (2009) explained that "volunteers who engage in

less challenging activities tend to be less likely to continue volunteering the following year" (p.

36). If however volunteers are provided with new and more senior roles as they master their

current tasks they will continue to be fulfilled and perhaps also contribute even more value to the organization.

That being said, organizations still must plan for the inevitable turnover of volunteer workers. Rochester (2006) warned, "one distinctive organizational challenge is to ensure that the inner core does not become overloaded and that due attention is paid to the issue of succession" (p. 32). If an organization continually returns to its dedicated inner-circle to fulfill essential volunteer roles these volunteers may suffer from fatigue and begin to limit their involvement. Govain (2009) suggested that succession be planned for "one to two years in advance" (p. 27) and Brown (2007) proposed that one way of accomplishing this is by matching new volunteers with veterans in a volunteer-mentorship program. In this way, new volunteers receive coaching and become familiar with the skills necessary to take on more senior volunteer responsibilities.

Motivation and recognition. Both intrinsic and extrinsic rewards should be considered when motivating volunteers. Waikayi et al. (2012) cited Fiorillo (2011) in stating "we can categorise volunteer motivation into two groups: one focusing on the intrinsic reward of helping others for its own sake; the other group of motives relate to extrinsic rewards from group activity and being part of the volunteer work environment" (p. 351). Inglis and Cleave (2006) took the idea of intrinsic and extrinsic rewards a step further in their identification of the "enhancement of self-worth" as a source of motivation for volunteers. They broke this down into two categories: recognition from others and self-recognition (p. 93). Although enhancement of self-worth could be seen as an intrinsic reward, the very extrinsic element of public recognition can bolster it. Further, Boezman and Ellemers (2007) suggested, "when volunteers experience pride and

volunteer organization respect, it is more likely that they will feel committed to, and intend to cooperate with, the organization" (p. 777).

The above review leads to two main conclusions. First, volunteer motivation and commitment can be positively influenced through feelings of pride and self-worth with regard to an individual's volunteering activities. Second, a volunteer-manager can encourage these feelings of pride and self-worth. Volunteer managers should seek to both recognize volunteers publicly and communicate directly to the volunteer the importance that they have within the organization. Govain (2009) echoed this and cited the importance of both public and private recognition mechanisms. Additionally, Boezman and Ellemers (2007) proposed leveraging "organizational experiences that enhanced perceived importance of volunteer work" (p. 783). In this way, volunteer managers cannot only tell their volunteers that their work makes a difference but should also show them, thus increasing their feelings of pride.

In addition to enhancement of self-worth, Inglis and Cleave (2006), in their assessment of governance volunteers in a major Canadian city, identified other components of motivation. By reviewing the literature, identifying major themes in motivation, and then validating them through the use of a consultative panel, Inglis and Cleave (2006) defined the following motivators and included them in their survey of volunteers: "Learning Through Community" (individual development), "Helping the Community" (altruism), "Developing Individual Relationships," "Unique Contributions to the Board" (making a difference), and "Self Healing" (escape from problems and loneliness) (p. 93-96). 540 volunteers (220 respondents) were asked to rate the relative importance of each of these motivators on a Likert-scale and, although

volunteers recognized that each of these components contributed somewhat to their motivation, they weighted self-healing as the least important factor, and helping the community the most important.

Given that helping the community was found to be an important component of volunteer motivation, any steps volunteer managers can take to reaffirm the difference that volunteers are making in the communities they are choosing to serve, both publicly and personally, are likely to have a positive effect on motivation. As suggested by Boezman and Ellemers (2007), offering organizational experiences that develop feelings of pride in volunteers, could be employed to achieve this. Additional means of communicating impact include providing concrete feedback, sharing volunteer successes in organizational publications, connecting volunteers with the beneficiaries of their efforts, and providing both emotional and task-oriented support (Boezman & Ellemers, 2007, p. 783).

Despite the clear evidence that volunteer recognition is essential to their motivation, according to a 2004 US report, only 35% of nonprofits regularly recognize the contributions of volunteers (Eisner et al., 2009, p. 34). Eisner et al. (2009) provided some examples of recognition opportunities such as appreciation ceremonies and events, tracking volunteer hours contributed, and assigning a dollar value to their contributions. Hager and Brudney (2004b) found that institutions that hosted recognition activities for their volunteers experienced higher volunteer retention than those that did not. Finally, Govain (2009) highlighted some opportunities to meaningfully engage and motivate volunteers through their involvement including recognizing personal accomplishments, seeking volunteers' counsel and truly listening

to it, providing intellectual content and stimulation, and providing "insider" information and access (p. 20).

With regard to timing of recognition activities, McCudden (2000) suggested that it is "important to focus on the two critical periods during a volunteer's relationship with the organization: the first six months and the first anniversary of their joining" (p. 61). As such, focus should be placed on instituting formal recognition processes at these two junctures. Whitson (2008) also emphasized the need to motivate as early as the recruitment stage. "If the volunteer lacks the inspiration to accept the position, the administrator is prepared to take the next step to motivate the individual" (p. 3). Although, the recruitment phase is too early to recognize the volunteer for their involvement, the volunteer-manager may motivate them in the form of an in-person dialogue or a personal phone call.

Evaluation. Evaluation is essential to reflecting on the volunteer program, and individual volunteer performance, and can lead to positive outcomes. Brudney (2000) explained, "evaluations of volunteers, if done well, can be a very insightful tool for the volunteer, the supervisor, and the volunteer manager" (p. 239). At the evaluation stage, it is not just the volunteer who may be evaluated but also the volunteer administrator and the program itself. Whitson (2008) suggested that the administrator should reflect on both the volunteer and their processes and seek feedback from the volunteer in order to address any necessary improvements. Additionally, Whitson (2008) proposed that recognition be coupled with evaluation. If a volunteer is positively evaluated he or she could be recognized at that time.

Despite its potential benefits, evaluation, and potential termination, of volunteers can be very challenging for those that manage them. According to Haski-Leventhal (2009), volunteer managers want to "avoid hurting the volunteer; causing anger to the volunteer or his/her peers; harming the recipients who will have one less volunteer to help them; or because they have had a long-term relationship with the volunteer" (p. 5). Given the potentially personal nature of the volunteer's relationship with the volunteer-manager, the organization, and the organization's beneficiaries, it is important that a volunteer-manager be impartial when evaluating their volunteers.

In order for a volunteer manager to remain objective in their evaluation of the volunteer's performance they must refer to the written job description in their analysis of whether the volunteer is meeting the needs and expectations of the job they are meant to fulfill. This may necessitate the tracking of individual performance to evaluate against the requirements of the position and could include "meeting attendance, the quality of that attendance (whether the member comes prepared), constructive contributions to conversations and the business of the board, and the necessary skills to perform the role" (Brown, 2007, p. 305). Brown (2007) also noted that some volunteer boards require their members to act as philanthropic examples and make financial contributions to the organization. This requirement could also be a component of evaluation that, if unfulfilled, may lead to termination.

Traits of the Effective Volunteer Manager

As evidenced by the above review of best practices, managing volunteers is a challenging task. "They [volunteer managers] need to be able to inspire people to give their time freely,

maintain their motivation, ensure that they match skilled people with relevant roles, and ensure that paid staff and volunteers are able to work together" (Brewis, Hill, & Stevens, 2010, p. 4). Additionally, Haski-Leventhal (2009) in their review reflected on managing volunteer workers to paid workers and concluded that the fact that volunteers are unpaid and difficult to sanction put more pressure on staff to manage them creatively and sensitively (p. 4). Gay (2001) similarly found that managing volunteers requires a tailored approach. He explained, "if volunteers' aspirations and expectation of voluntary work are to be met, VMs [volunteer managers] must be skillful both in their interpersonal relationship and in creating a climate in which volunteers can flourish" (p. 63).

This balancing act is representative of the debate over the professionalization of volunteer-management, as outlined above. Organizations are increasingly implementing a human-resource management approach when it comes to managing volunteers. The structure that this provides is essential to a volunteer-management program as it both improves the volunteer experience (thus retention) and increases positive outcomes for the organization. That being said, some volunteers still approach this work as a leisure activity and volunteer-managers need to factor this into their management style. Jarvis (2007) summarized, "volunteers, while wanting their voluntary work to be well-organised, also want a degree of flexibility and freedom" (p. 5).

Volunteer managers therefore need to determine how to balance the structure and discipline of a formal program with the responsiveness, personal interaction, and attention desired by their volunteers. According to Govain (2009), the ambiguous concept of chemistry is

of paramount importance in volunteer relations because it "creates meaningful partnerships, truly advances the organization, raises transformative gifts, and connects the organization to solid and productive networks for sustainability" (p. 22). Govain (2009) also recognized that fostering chemistry can be both the biggest staff challenge and the most rewarding responsibility. Gay (2000) echoed this in his statement that "interpersonal skills were regarded as lying at the heart of successful volunteer management" (p. 51).

Despite the complex nature of the work, "prior to 2004, little to no empirical research existed that quantitatively investigated and identified the core competencies needed for managers of volunteers to effectively administer volunteer-based programs and the individuals who serve therein" (Safrit & Schmiesing, 2012, p. 18). It was in 2005 that Safrit, Schmiesing, Gliem, and Gliem proposed the PEP ((Personal) Preparation, (Volunteer) Engagement, and (Program) Perpetuation) model. PEP includes nine competencies including elements of personal planning (personal and professional development, serving as an internal consultant, and program planning), volunteer engagement (recruitment, selection, orientation and training, and coaching and supervision), and program perpetuation (recognition and program evaluation, impact, and accountability) (Safrit & Schmiesing, 2012, p. 19). Much of this has already been reviewed in the above section but adds concepts of planning, evaluation and professional development.

These constructs also appear in the five core competencies outlined by the Council for the Certification of Volunteer Administration (CCVA) in 2008. In addition to the components of a volunteer-management program, outlined above (dubbed "Human Resource Management" by the CCVA), ethics, organizational management, accountability, and leadership and advocacy

round out the competencies the CCVA deems essential in an effective volunteer manager (Safrit

& Schmiesing, 2012, p. 24).

A key component to these competencies evidenced in the PEP model and the CCVA

framework is personal and professional development. Machin and Paine (2008) found "that

'managers of volunteers' tend to have considerable experience at doing the job, but less exposure

to training on volunteer management" (p. 8). Although these administrators may have worked

with volunteers for extended periods of time they lack formal training. Eisner et al. (2009)

echoed this finding, "nationally, [in the USA] one-third of paid nonprofit staff who manage

volunteers, have never had 'any formal training in volunteer administration, such as coursework,

workshops, or attendance at conferences that focus on volunteer management'" (p. 35). Ideally,

the introduction of a formal training program, such as the one proposed in this study, would

increase the effectiveness of the volunteer-manager, providing him or her with the necessary

tools to streamline the time required to supervise volunteers and the time the volunteers require

to undertake their duties.

Despite the recognition of the importance of professional volunteer-management

programs, there has been little investigation into the professional development needs of

volunteer-managers. "Given that the function of volunteer management is rarely a standalone

position, and only recently seen as a profession, there has been very limited analysis of the type

of skills required for the role and how they can be developed" (Brewis et al., 2010, p. 11).

Clearly there is ample research into the tasks associated with volunteer-management (defining

job descriptions, recruitment, training, recognition and motivation, evaluation) however the skills required to undertake these tasks remain under-documented.

Several authors have approached training and development from the perspective of the volunteer manager, looking to them to identify their preferred training and development delivery methods. In their survey of 1,004 people who manage volunteers, in a variety of types of organizations (supplemented by ten qualitative interviews), Brewis et al. (2010) found that volunteer-managers are demanding more training and skills development and that they seek out advice and support from colleagues in the absence of formal training. In addition to collegial support, volunteer-managers wanting to learn more about their profession turned to conferences, reading and self-study, government resources, networking and general management courses (Brewis et al., 2010, p. 29). Several of these opportunities are echoed by Gay (2001) primarily the provision of forums for the exchange of ideas (e.g., conferences, seminars, networks). In addition, those surveyed by Gay (2001) thought formal courses could cover lessons on time and project management alongside specific exercises in volunteer-management (p. 19).

Haski-Leventhal (2009) emphasized the importance of personal responsibility in keeping up-to date with trends in volunteer management. "Managers of volunteers should make an acquaintance with the existing body of knowledge on volunteerism and volunteer management, and use it to better manage and retain their volunteers" (p. 4). With regard to the present study, some of these self-directed training opportunities could be incorporated into, or facilitated through, a formal institutional training and development program.

Brewis et al. (2010) found two factors increased a volunteer-manager's inclination toward training: participation in networks and previous training. If volunteer-managers are part of an existing network of people with similar responsibilities they are more apt to seek out personal and professional development. Additionally those who had previously received some form of volunteer-management training were more likely to be open to training in the future (p. 38).

<div align="center">**Needs Assessment**</div>

With an understanding of general best practices in volunteer-management and the traits of an effective volunteer manager, an assessment of the current state of volunteer-management in McGill Development and Alumni Relations (DAR) can be undertaken. According to Shushan (2012) "probably the most important and overlooked step in the learning process is a needs assessment" (p. 61). He went on to say that involvement of staff in the process of defining training needs increases their motivation to then participate in the learning process. Without an evaluation of the current situation, information on the ideal state, and the involvement of fundraising staff in the process, there is no foundation on which to base a training and development program.

Background

In 2011, the Office of Volunteer Partnerships undertook a survey of 40 participants including Deans, DAR staff, and McGill volunteer leaders in an effort to get a broad, initial understanding of the context in which the office would operate. Several issues were identified relating to structure, management, and staffing including a lack of support for staff managing

volunteers. This was leading to frustration on the part of staff and volunteers, limited volunteer

recognition and appreciation, and volunteers missing critical support to carry out their mandate.

It was found that "gift officers (with the exception of Annual Fund Officers) generally have very

limited experience in working with volunteers. It is not second nature to them to involve

volunteers in the development process" (Govain & Crowly, 2011, p. 31). Additionally, staff

cited specific tools that would help them with their volunteer-management responsibilities

including improved materials, job descriptions, mandates, training manuals, and collateral

materials about their Faculties and programs.

      Fundraising staff (also referred to as gift officers) intuitively voiced several key

components of a professional volunteer-management framework but they have yet to receive

formal training on the infrastructure, tasks, or skills associated with it. It is important to note that

for the vast majority of fundraising staff at DAR, volunteer-management is not their primary

responsibility. According to Brewis et al. (2010), this is indicative of the entire sector. They

explained their findings that "managing volunteers is usually part of a wider role. Just 14%

spend more than three-quarters of their time organizing volunteers and 56% spend less than a

quarter of their time doing this" (p. 19).

      Despite their divided focus, staff do not necessarily lack adequate time to be successful in

their volunteer-management responsibilities. Hager and Brudney (2004b) found that volunteer

"retention rates do not vary according to the percentage of time a paid staff member devotes to

managing the volunteer program" (p. 10). These employees however do perhaps need more

support and direction in their volunteer-management function than if it were their sole mandate.

In fact, a barrier to training cited by volunteer managers was that their volunteer-management responsibilities did not account for a large enough portion of their entire portfolio (Brewis et al., 2010).

Although it presented a sound summary of the volunteer program at DAR, based on assessments by multiple stakeholders, the 2011 review was somewhat limited in its scope and validity. It incorporated the views of only 15 fundraising staff (out of approximately 60), three of whom belonged to the Senior Management Committee at DAR. Additionally, participants were named in the study, potentially biasing their responses. The present study seeks to build on the base of information from 2011 and undertake an updated and more comprehensive review of volunteer-management beliefs, skills and knowledge, and tools and support in DAR. Based on this review, a proposal for a training and development program targeted specifically at the needs of DAR fundraising staff will be developed. To achieve an understanding of the current state and future direction of volunteer-management in McGill Development and Alumni Relations, the following questions will be addressed:

1. What beliefs and attitudes do the fundraisers hold with regard to managing volunteers and its potential to bring about positive outcomes in terms of increased alumni engagement and fundraising success?

2. What skills and knowledge of volunteer management strategies do the fundraisers have?

3. What percentage of the fundraisers' time is devoted to volunteer-management related tasks?

4. What tools and support are available to fundraisers with regard to their volunteer management responsibilities (both perceived and actual)?

5. How does senior management assess the current beliefs among fundraisers about volunteer-
   management and how do they view the current level of skills, knowledge, and commitment
   to the practice at DAR?

6. Where does senior management want to be in terms of the volunteer-management program
   and fundraisers' role within it?

Based on this needs assessment, recommendations can be made to develop an
infrastructure of support for fundraisers undertaking volunteer-management responsibilities.
This may include professional development, training, and the development of tools and a support
system.

Methodology

Questionnaire. To achieve an understanding of the six questions, listed above, a
questionnaire was developed and sent to all staff at DAR with a fundraising mandate (see
appendix A for a copy of the questionnaire). The questionnaire began with basic questions to
ascertain the nature of the respondent's job at DAR and their level of experience with
fundraising and with managing volunteers. From there, a Likert or Likert-type scale was used so
respondents could indicate their general level of agreement with statements on three themes:
beliefs and attitudes, knowledge and skills, and tools and support. Respondents who indicated
that they did not currently manage or participate in the management of at least one volunteer or
volunteer group were led to an extra question (refer to page four of the questionnaire) to confirm
that they had some past experience managing volunteers on which to base their subsequent
responses. If they did not have past experience, the questionnaire was terminated for them and

only their responses submitted thus far were tabulated. Respondents were additionally provided the opportunity to submit comments in a free-form box.

When defining the population of interest, I chose to focus on all staff in McGill Development and Alumni Relations whose mandate includes a direct fundraising component – those who have a fundraising mandate. There is no single list of all staff with a fundraising mandate as this may include front-line fundraisers as well as those that work in the Annual Fund on direct mail solicitations, and those that work in Alumni Relations to engage parents to become philanthropic toward McGill. To develop a comprehensive list of questionnaire recipients, I first approached the Managing Director of Development Programs, who manages the majority of the front-line fundraising staff and maintains a list of their contact information. I then contacted the Associate Director, Annual Giving, and the Associate Director, Alumni Programs, for a list of their staff whose mandate involved a fundraising component. Once these three lists were combined I had a list of 62 people who were the focus of this study.

An email was sent, from me, to all 62 staff with a fundraising mandate on 20 February 2013, asking for their participation and including a link to the questionnaire, hosted online using the Survey Monkey service. On 7 March 2013, Royal Govain, of his own accord, and spurred by discussions of the importance of volunteer-engagement at DAR happening independent of the present study, sent an email to fundraising staff encouraging them to participate in the questionnaire. I sent a final follow-up email on 11 March 2013 to remind recipients to participate and to advise them that the questionnaire would close on 15 March 2013. All of these emails can be found in appendix B. Of the 62 people who were invited to participate, 44

completed the questionnaire; a response rate of 70.9 per cent. Four people exited the survey

before it was complete.

      Focus group. A focus group was held in follow-up to the questionnaire in order to

achieve a better understanding of the perspectives of fundraising staff. Please refer to appendix

C for an outline of questions prepared to guide the focus group discussion. The focus group was

led by me and was conducted at Martlet House, the central office for Development and Alumni

Relations. As such, all participants were familiar with the location and could easily access it.

The Managing Director of Volunteer Partnerships was in attendance as an observer but he did

not participate in any of the dialogue. Additionally, he sat apart from the group, along the

perimeter of the room, with all participants around the same table in the centre. The focus group

was held on 19 March 2013, 9:30 to 11:00 a.m., coffee and pastries were served.

      Focus group participants were chosen in such a way as to balance gender, experience

level, and nature of their job (for example, regional fundraisers, centrally-based fundraisers, and

Faculty-based fundraisers). Participants were hand-selected in consultation with the Managing

Director of Volunteer Partnerships. Each participant's level of volunteer-management

experience was operationalized as either beginner, intermediate, advanced, or expert and two

people from each category were chosen for the focus group. Since he would be present for the

focus group, for ethical reasons, none of the selected participants reported to the Managing

Director of Volunteer Partnerships. Eight people were sent an email on 8 March 2013 inviting

them to participate (see appendix D for the recruitment email). When one recipient did not

respond, an alternate person with approximately the same experience level in working with

volunteers was invited to participate in their place.   Eight people participated in the focus group, although one only arrived at 10:15 a.m., 45 minutes late, owing to a slowdown in public transportation caused by a snowstorm.

Senior management consultation. With a better understanding of the fundraisers' self-reported skills and needs, as well as their perceptions of tools and support, it was important to get input from the senior DAR management. A session was held with members of the Senior Management Team who are implicated to some extent in volunteer-management, be it through management of fundraising staff or strategic involvement with the volunteer-management program. This included the Vice-Principal (Development and Alumni Relations); the Managing Director, Development Programs; the Managing Director, Volunteer Partnerships; the Managing Director, Donor Engagement and Strategy; and the Senior Human Resources Professional. The Managing Director, Alumni Relations, was unable to attend on the scheduled date. The goals of this session were two-fold: (a) to obtain the senior managers' perceptions of the fundraisers' beliefs, skills and needs, as well as the tools and support available to them, and (b) to fully understand where senior management wants this program to be. Shushan (2012) described this as "'the day after' definition, which is the desired change in behavior, performance, and results" (p. 62). The format of the meeting was an informal, in-person, exchange that I guided based on the list of questions found in appendix E.

Results

Questionnaire. Results of the questionnaire pertaining to beliefs, knowledge and skills, and tools and support are presented in the Discussion section, and related directly to the research

questions listed above and repeated below. To better contextualize this analysis an

understanding of the composition and demographics of the respondents must be achieved. As

can be seen in Table 1, there were respondents from DAR central, faculties and units, and

regions; regional fundraisers represent the smallest number, as there are very few regional

fundraisers. The experience level of respondents is fairly well distributed (see Table 2), with

over 40 per cent having been at DAR for four years or less, 22.7 per cent reporting having

worked at DAR for five to seven years, and 36.3 per cent for eight years or more.

Table 1

Primary Work Placement of Fundraisers

Question: I work in

Work Placement	Response Percent	Response Count
A Faculty or Department	63.6%	28
DAR central	31.8%	14
A region	4.5%	2

Table 2

Length of Employment at DAR

Question: I have worked at DAR for

Length of Employment	Response Percent	Response Count
Less than 2 years	20.5%	9
2 to 4 years	20.5%	9
5 to 7 years	22.7%	10
8 to10 years	13.6%	6
11 to 14 years	6.8%	3
15 or more years	15.9%	7

The depth of fundraising experience is split between fairly new to the field and seasoned professionals (Table 3). Sixteen respondents, or 36.3 per cent, have been fundraisers for less than five years and 27.3 per cent have worked as a fundraiser for 15 or more years. Of the 18 people who have worked at DAR for four years or less, 66.7 per cent also have less than five years of fundraising experience. This indicates that those new to DAR are often also new to the field of fundraising.

Table 3

Fundraising Experience Among DAR Fundraisers

Question: I have worked as a fundraiser for

Length of Fundraising Experience	Response Percent	Response Count
Less than 2 years	13.6%	6
2 to 4 years	22.7%	10
5 to 7 years	20.5%	9
8 to 10 years	6.8%	3
11 to 14 years	4.5%	2
15 or more years	27.3%	12
My primary responsibility is not fundraising.	4.5%	2

With regard to experience working with volunteers, 40 per cent of respondents reported having worked with volunteers for 15 or more years (see Table 4). This represents 14 people at DAR who may or may not have been formally trained in volunteer-management, but do have practical knowledge of its application. That said, 34.3 per cent of respondents have less than five years of experience working with volunteers. Of those having worked at DAR for four years or less, 58.3 per cent have less than five years of experience working with volunteers. Again, this indicates that when new staff members join DAR, at least half of them have limited fundraising and volunteer-management experience.

Table 4

Volunteer-management Experience Among DAR Fundraisers

Question: I have worked with volunteers for

Length of Volunteer-Management Experience	Response Percent	Response Count
Less than 2 years	11.4%	4
2 to 4 years	22.9%	8
5 to 7 years	17.1%	6
8 to 10 years	2.9%	1
11 to 14 years	5.7%	2
15 or more years	40.0%	14

These results clearly illustrate that the level of experience at DAR, with fundraising, and with volunteer management, varies greatly among the fundraising staff. Additionally, new staff to DAR may have greater training needs due to their relative inexperience. There are however a good number of fundraising staff, 16 in total, with 11 or more years of experience in working with volunteers. As such, the survey results will be reviewed, in the context of the below research questions, paying special attention to those relatively new to volunteer management (those with less than five years experience, $n = 12$), and those with 11 or more years of volunteer management experience ($n = 16$). It is expected that these groups will represent two extremes and illustrate the range of skills and training needs.

Focus group. The range of beliefs and opinions expressed in the focus group did not vary substantially based on level of experience in volunteer management. Rather, those considered "expert" seemed better able to articulate the concept of volunteer management, their beliefs around the practice, and its application at DAR. Those with somewhat less experience were quick to agree, often nodding and expressing concurrence while the other person was

talking. They would also then add their own experiences and ideas, having had the context defined for them.

Across all experience levels, there was agreement as to the need to invest in volunteers and the positive outcomes associated with employing them. Several challenges to this were cited including building culture and community, career tracking and maintaining volunteer engagement and satisfaction, and building and sustaining relationships in a field with high employee turnover. All participants engaged in the conversation surrounding these challenges and echoed their own experiences with them. Perhaps the most heavily emphasized was the need for community and a culture across all departments at the University that values volunteers.

Participants reflected that they received no training in volunteer management and rather learned by observing and doing. There was a desire expressed for more training, tools, and support, and for the development of opportunities to share ideas and experiences with colleagues across DAR. This was particularly important to participants considered "beginner" and "intermediate" although there was also agreement among those with greater depth of volunteer-management experience. These outcomes are discussed more fully in the context of the research questions below.

Senior management consultation. Senior management emphasized the importance of deepening the depth and scope of volunteer engagement at DAR. There was some consistency between senior management and focus group responses, particularly in their assessment of the positive outcomes associated with volunteer engagement and in their assertion in the power of stories to communicate the potential of volunteers. The two groups also, independent of one

another, raised the importance of institutional culture and communicating the importance of volunteers across the University community.

Senior management cited several challenges they believed fundraisers to have that prevent them from fully embracing and leveraging volunteer partnerships. These include difficulties building relationships and making connections, a lack of understanding of how to engage volunteers effectively, a belief that volunteer management takes up too much time, and a misconception that volunteer management is not part of their job. These challenges, and other outcomes of the senior management consultation, are discussed more fully below, related specifically to the research questions.

Discussion

Research question 1. What beliefs and attitudes do the fundraisers hold with regard to managing volunteers and its potential to bring about positive outcomes in terms of increased alumni engagement and fundraising success? Beliefs about the importance and role of volunteers not only influence a staff member's propensity to take on volunteer-management activities but they may also have an impact on volunteer retention. Hager and Brudney (2004b) found that "the greater the number of benefits charities feel they realize from volunteer involvement, the higher their rate of volunteer retention" (p. 11). One could speculate on the various reasons for this including more positive interactions with volunteers and greater emotional and intellectual investment in the program translating to an improved volunteer experience, but the bottom line is that beliefs are a critical component to effective volunteer-management. Skills and knowledge alone are not enough.

The Likert-scale questions in Table 5 indicate the beliefs and attitudes about volunteer-management held by fundraising staff. Overall, respondents hold positive beliefs about the importance of volunteers. The vast majority of respondents believe volunteer management is part of their job: 62.5 per cent strongly agree with the statement, another 30 per cent agree, and no respondents disagreed. This is in contrast to the expectations of senior management who believe that most fundraisers do not consider volunteer management to be part of their job. Also in the consultation with senior management, it was stated that volunteer management is typically not listed as a responsibility in the job descriptions of fundraisers nor is it necessarily a specific skill that is looked for during the recruitment process. Given that there is no written documentation to that effect, it is a strong indication of beliefs that all respondents agreed to some degree that volunteer management is their responsibility.

With regard to allocation of resources to volunteer-management activities, 20 per cent of respondents believe that managing volunteers takes up too much of their time. In comparing those with relatively low volunteer-management experience (four or less years) and those with high experience (11 or more years), one beginner (out of 12 who responded to the question, 8.3 per cent) and three experts (out of 15 respondents, 20 per cent) believe that volunteer management takes up too much of their time. Surprisingly, a higher percentage of experienced volunteer managers hold this belief as compared to those relatively new to the field. Senior management cited this belief as a barrier to engaging volunteers. Although it is clearly present, with one in five fundraisers either agreeing or strongly agreeing with the statement, the belief

that volunteer management takes up too much time is not as widely held as senior management

may have thought.

Despite the difficulties fundraisers may have finding time for volunteer-management

responsibilities, all questionnaire respondents agreed that developing strong volunteer

partnerships should be a priority for DAR, 85 per cent of whom strongly agree with the

statement. Within the highly experienced cohort (those with 11 or more years of experience),

100 per cent strongly agreed with this statement, indicating a firmly held belief. Overall, these

results demonstrate that fundraisers at DAR believe in the importance of working with

volunteers. Almost all respondents–97.5 per cent–agreed that volunteers help them to achieve

their goals and the goals of their institution. Again, this was consistent across experience levels.

Table 5

Volunteer-management Beliefs Among DAR Fundraisers

Question: indicate your level of agreement with the following statements

Statements	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	N/A	Rating Average
Volunteer-management is part of my job.	0	0	3	12	25	0	4.55
Volunteers help me achieve my goals and the goals of my institution.	0	1	0	13	26	0	4.60
Managing volunteers takes up too much of my time.	8	12	12	5	3	0	2.58
Volunteers are too demanding.	7	18	13	2	0	0	2.25
I enjoy working with volunteers.	0	0	6	22	12	0	4.15
I have a responsibility to the volunteers I work with.	0	0	1	9	30	0	4.73

Developing strong volunteer partnerships should be a priority for DAR.	0	0	0	6	34	0	4.85

The focus group presented results consistent with the questionnaire. Participants expressed a positive view of volunteer engagement and its potential to drive fundraising results. One participant who is relatively new to volunteer management (beginner) expressed a belief that volunteers can open doors that he alone could not open. Without a volunteer who knows someone, he said, "you're just some joker from McGill." Another participant with advanced volunteer experience explained that she is motivated by her volunteers and understands that when they feel supported, she can ask them for almost anything she needs. A participant with a great depth of experience with volunteers (expert) believes that working with them forces you to think better because you have to be prepared to answer all the questions they may have. He further stated his belief that volunteers are more grounded than paid fundraising staff and that they see the big picture. Yet another beginner participant recounted that when he is feeling depressed he calls a volunteer as it reconnects him with his mission and the mission of the University.

There was agreement between the focus group participants and senior management about what the positive outcomes of volunteer engagement may be. These include gaining access to people, places, and networks, winning over champions for the cause to act as role models and to spread positive word of mouth, increasing fundraising capacity by engaging volunteers as

fundraisers, and benefiting from increased philanthropic support from volunteers who become

deeply invested in the institution and willing to give back in the form of time and money.

Because there was such broad acceptance by focus group participants of the positive

potential associated with employing volunteers, the conversation moved quickly to the

challenges that fundraisers face in their volunteer-engagement efforts. One of the obstacles cited

most often was promoting a culture that values volunteers within McGill, beyond DAR.

Volunteers want to engage meaningfully with the McGill community but at times it is difficult to

find an appropriate and willing staff member, professor, or project director to connect them with.

One participant (beginner) said that, in his experience, there is a lack of awareness internally that

McGill is a charitable organization that relies on volunteers and philanthropy. Another

participant (intermediate) recalled one McGill staff member telling them, "that's great that

you're in fundraising but we don't see any of that [money]." The fundraisers are seeking

guidance on how to open their faculty and department communities up to volunteers to enrich

their experiences and their impact. Senior management echoed this, speaking about the need to

involve staff across McGill in the process.

Another challenge that recurred in the focus group conversation was that of career

tracking or succession planning for volunteers. There was recognition of the need to keep

volunteers engaged over time even when their utility on a specific project dwindles or their term

on a volunteer board ends. An element of this is also volunteer fatigue–making sure that you do

not return to the same volunteers over and over and that they are cycled through volunteer

positions with greater and lesser intensity of commitment. One participant recounted that a

volunteer told her, "I love it [being a committee volunteer], but you have to find new blood."

Building meaningful relationships with volunteers was also cited as a challenge by both

the fundraisers in the focus group and senior management. This is particularly important in the

face of turnover, both among fundraising staff and other staff at the University. One expert

participant described this as a problem of "continuity" without which we lose traction in the

development of these relationships and credibility as an organization. Another participant with

intermediate experience asserted that we must be "masters" of building relationships. Senior

management agreed with this assessment, emphasizing listening and communications skills as

essential to this process. They also spoke about natural connectors–those with an innate ability

to make meaningful connections between people and with the institution. Not all fundraisers

have this natural propensity and as such it needs to be cultivated if volunteer relationships are to

be successful.

Both the focus group participants and senior management spoke about the power of

storytelling to influence beliefs. A member of the senior management group recounted how

having an established relationship with a volunteer abroad led him to a meeting with a very

influential and prominent businessperson. Without that connection, he would not have been able

to secure the meeting and perhaps would not even have been aware of the businessperson, their

connection to McGill, and their capacity to give back. This was cited as an example of a story

that would have resonance with the fundraisers. The focus group participants also saw potential

for storytelling to educate faculty and staff, communicating the importance and potential of

volunteer engagement. They further saw the value in having volunteers tell their own stories of why they volunteer and what they get out of the process. One participant said outright that he would like to have volunteers speak to "us"–the fundraisers.

Overall, these results demonstrate that fundraisers hold positive beliefs about volunteer management, understand that it is part of their job, and assert that it should be a priority for DAR. Despite some, especially those most experienced in volunteer management, believing that it takes up too much of their time, there is great acceptance of the potential of volunteers to help fundraisers achieve their goals and to lead to positive outcomes.

Research question 2. What skills and knowledge of volunteer management strategies do the fundraisers have? The survey results, as illustrated in Table 6, demonstrate that many fundraisers at DAR believe they have the knowledge and skills required to manage volunteers. The majority of respondents (62.5 per cent) either agreed or strongly agreed that they have all the requisite skills to effectively manage volunteers and volunteer groups. Only eight people, or 20 per cent, disagreed with the statement and none strongly disagreed. Not surprisingly, five of these eight people had less than five years of volunteer-management experience and only one had 11 or more year's experience. This is indicative of the sentiment expressed during the focus group that volunteer-management knowledge and skills are not taught to new staff rather they learn by doing and observing. If this is the case, new DAR staff, particularly those new to working with volunteers, would need a substantial amount of time to develop their skills through trial and error in the absence of formal training.

Despite 20 per cent of respondents acknowledging that they lack the skills and knowledge to effectively manage volunteers, 87.5 per cent are confident in their interactions with volunteers. Whereas 25 respondents believe they have requisite volunteer-management knowledge and skills, 35 are confident in their relationships and 31 feel they maintain an appropriate level of communication with them. This indicates that although some fundraisers recognize they do not have concrete volunteer-management skills, they still succeed in developing these partnerships through whatever means are at their disposal. Interestingly, there was little difference in the responses of beginners and experts in the field. Of those with less than five years experience with volunteers ($n = 12$), 2 (16.6 per cent) admitted to not being confident in their interactions. This compares to 1 (6.6 per cent) of the 15 respondents with more than 11 years experience admitting the same. Given the large discrepancy in experience level, a greater difference in confidence level was expected.

The statements related to knowing volunteers' needs and how to deliver on them, and having volunteers that feel supported, fulfilled, and a sense of pride elicited the most neutral responses, 30 and 40 per cent respectively. More than any of the other questions in this grouping, these pertain to the motivations of volunteers. To be able to assert that one's volunteers are supported, fulfilled, and feel and sense of pride requires an understanding of why they volunteer and what gives them that sense of pride. Additionally, knowing the needs of volunteers is developed from an understanding of why they engaged with the institution and how they want to interact with it. Perhaps this is why so many respondents were unable to agree or disagree with these statements; to have an opinion would require first an understanding of the volunteer's

desires and motivations. It is easier to take a stance regarding statements that pertain to one's

own work because this is something the fundraisers have control over–their interactions with

volunteers, their own skills development, their level of communication with volunteers, and their

work outcomes.

Consistent with the beliefs cited above, questionnaire respondents agreed that managing

volunteers has led to positive outcomes for them as it pertains to their work (90 per cent of

respondents) and that it has allowed them to engage McGill alumni, donors, and friends in

meaningful ways (77.5 per cent). This was more pronounced within the experienced cohort with

100 per cent agreeing that volunteer management had led to positive outcomes and 86.6 per cent

seeing it lead to meaningful engagement. This compares to 83 per cent of the beginner cohort

agreeing with each statement. It is reasonable to expect that those with greater experience have

successfully leveraged volunteer relationships more than those with less experience, owing both

to their developed knowledge and skills and the longer length of time they have had to witness

such positive outcomes.

Table 6

Volunteer-management Knowledge and Skills Among DAR Fundraisers

Question: indicate your level of agreement with the following statements

Statements	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	N/A	Rating Average
I have all the requisite skills to effectively manage volunteers and volunteer groups.	0	8	7	17	8	0	3.63
I am confident in my interactions with volunteers.	0	3	2	23	12	0	4.10

Managing volunteers has led to positive outcomes for me as it pertains to my work.	0	2	2	20	16	0	4.25
I know what my volunteers need and how to deliver it.	0	4	12	16	8	0	3.70
The volunteers that I manage feel supported, fulfilled, and a sense of pride in their work.	0	1	16	17	5	1	3.67
I maintain an appropriate level of communication with my volunteers.	0	3	6	24	7	0	3.88
Volunteer engagement has allowed me to engage McGill alumni, donors, and friends in meaningful ways.	0	2	6	19	12	1	4.05

In the focus group, one beginner asked outright, "what are the best practices?" There was a definite desire to know how best to start a group and how it integrates into a fundraiser's typical workflow. During the focus group, I presented the participants with a list of types of volunteer-management activities, as defined in the literature, for their review. These included job descriptions, recruitment and selection, orientation and training, development and career tracking, recognition, evaluation, and building chemistry and meaningful relationships. The group recognized the importance of all of these and added additional elements: satisfaction and motivation, and building community. This exercise and interaction demonstrated that there is a willingness to learn more about best practices in volunteer management, recognition of their importance, and a need for standardization and the develop of systems to support them.

The list of different types of volunteer-management activities that was presented in the focus group was also used in the survey. Respondents were asked to indicate their level of confidence with each and the results can be seen in Table 7. On average, results were weighted

between somewhat confident and confident, with volunteer development and career tracking

being the area in which fundraisers have the least amount of confidence (60 per cent were either

not confident or somewhat confident). The area that fundraisers were most confident about was

volunteer recognition with 77.5 per cent of respondents asserting themselves to be confident or

very confident. Interestingly, in each category there were at least three (and at most 11) people

who felt very confident in undertaking that specific activity.

When comparing those least and most experienced in volunteer management, the

expectation was that those with more experience would have more confidence. This held true

across all activities, although the margin was very close regarding evaluation. Of those with less

than five years of experience, 58.3 per cent indicated that they were confident or very confident

evaluating volunteers whereas of those with more than ten years experience 60 per cent were

confident or very confident.

Table 7

Confidence of DAR Fundraisers in Undertaking Volunteer-Management Activities

Question: indicate your level of confidence with your ability to carry out the following activities.

Activities	Not Confident	Somewhat Confident	Confident	Very Confident	N/A	Rating Average
Defining volunteer job descriptions	3	10	16	11	0	2.88
Volunteer recruitment	7	4	18	11	0	2.83
Volunteer orientation and training	6	11	15	8	0	2.63
Volunteer development/career tracking	10	14	13	3	0	2.23
Volunteer recognition	0	9	21	10	0	3.03
Volunteer evaluation	4	15	14	7	0	2.60

There is not a simple answer to the question of what skills and knowledge of volunteer-management strategies the fundraisers have. Many of them believe that they have the requisite skills in this field, particularly among those with many years of experience. Even more are confident in their relationships and communications with volunteers indicating that although they may not have a complete understanding of the basic principles of volunteer management, they can still get the job done and reported being successful in terms of positive outcomes and engagement. Even so, they have a desire to learn more about and gain confidence with the basic principles of volunteer management, motivation and career tracking perhaps being of greatest importance.

Research question 3. What percentage of the fundraisers' time is devoted to volunteer-management related tasks? This question was posed in the questionnaire, within the focus group, and during the consultation with senior management. The questionnaire did not allow for free-form answers to this question and it was a mandatory field. Most people responded that volunteer-management accounted for 10 to 15 per cent of their time (34.3 per cent of respondents), although 11.4 per cent of respondents indicated that they spent in excess of 25 per cent of their time on managing volunteers (see Table 8). In hindsight, after the in-person sessions, this question may be misleading and difficult to interpret accurately. Both the focus group participants and senior management expressed that managing volunteers is not necessarily a distinct activity with a beginning and an end; rather it is integrated into everything that a fundraiser does. As such, those answering that they spent more than 25 per cent of their time

working with volunteers may also respond that they spend more than 80 per cent of their time

fundraising because the two mandates overlap into the same activities.

Table 8

Percentage of Time Spent by DAR Fundraisers Working on Volunteer-Management

Question: indicate the percentage of your time allocated to volunteer-management

Percentage of time	Response Percent	Response Count
Less than 10%	28.6%	10
10 to 15%	34.3%	12
16 to 20%	14.3%	5
21 to 25%	11.4%	4
More than 25%	11.4%	4

During the focus group session, one of the experienced participants cautioned against

drawing the line between volunteer management and what fundraisers do on a daily basis. He

referred to this as an "artificial discrimination" as volunteer management is the process of

fundraising and emphasized the need to change the way we look at volunteer-management

activities as somehow distinct from fundraising efforts. There was broad agreement within the

group: beginner, intermediate and advanced volunteer managers could all be seen nodding and

some expressed agreement verbally, saying "yes" and "great point" as he outlined his stance.

This dialogue around the artificial discrimination made between volunteer-management

and fundraising tasks echoed a similar discussion with the senior management team. They

referred to the two activities as contiguous, ideally one would lead into the other seamlessly so

that they become one effort and not separate and distinct from each other. There was recognition

by both the senior management team and the focus group participants that this seamless

integration is not the reality of the current situation. Therefore, the answer to the third research

question is not as straightforward as expected. Rather than trying to have fundraisers set aside

time to take on volunteer-management tasks, they should be taught how to integrate these into all

that they do and educated about the different ways that volunteers can be called upon to help

them reach their fundraising goals. If this can be accomplished, fundraisers may increasingly

view and carryout fundraising and volunteer management as an integrated whole as opposed to

separate mandates.

        Research question 4. What tools and support are available to fundraisers with regard to

their volunteer-management responsibilities (both perceived and actual)? The questionnaire

results, illustrated in Table 9, demonstrate that although the majority of fundraisers feel they are

well prepared to undertake volunteer-management related tasks (65 per cent agreed or strongly

agreed with the statement), only 40 per cent agree or strongly agree that they received sufficient

training to take on these responsibilities. Again, this is indicative of the learning-as-you-go

approach that seems to be the current situation. Further, 55 per cent of respondents disagree or

strongly disagree that there are adequate tools, templates, and information made available to

them. However, 77.5 per cent of respondents agree or strongly agree that they have someone

knowledgeable they can turn to for advice.

        Examining the responses of those new to volunteer-management depicts a different

situation. Only 41.7 per cent of this cohort felt well prepared to undertake volunteer-

management activities, as opposed to 65 per cent of the overall group and 86.7 per cent of those

with 11 or more years of volunteer-management experience. Further, 58.3 per cent of those with

less than five years of volunteer-management experience disagreed or strongly disagreed that they received sufficient training. This compares to 45 per cent of all respondents, and 20 per cent of the experienced group. Also, only one respondent (out of 12, 8.3 per cent) agreed that there were sufficient tools or templates available to them, as opposed to 20 per cent of the more experienced cohort.

Taken together, these results show that although there is general agreement among the fundraisers that training and the availability of tools are lacking, this is more pronounced among the less experienced group. Contrarily, 11 of the 12 respondents with less than five years of volunteer-management experience agreed or strongly agreed that they have someone knowledgeable to go to for advice. This was even higher than in the experienced group although both represented very large proportions (91.7 per cent of respondents compared to 86.7 per cent). Therefore, despite a lack of formal training, and the availability of tools, templates, and information, fundraisers typically have someone they can go to for advice and generally feel somewhat well prepared for volunteer-management activities by virtue of experience.

Table 9

DAR Fundraisers' Perceived Availability of Volunteer-Management Training, Support, and Tools

Question: indicate your level of agreement with the following statements

Statements	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	N/A	Rating Average
I am well prepared to undertake volunteer-management related tasks.	0	5	9	19	7	0	3.70
I received sufficient training to be able to take on volunteer-management responsibilities successfully.	4	14	6	15	1	0	2.88

There are adequate tools, templates, and information available to me to ensure I can maintain positive volunteer relationships.	4	18	11	6	0	1	2.49
When I have a difficult volunteer-management situation to deal with I have someone knowledgeable I can speak to for advice.	1	2	6	19	12	0	3.98
I would like to have more training on how to carry out my volunteer-management responsibilities.	2	3	8	18	9	0	3.73
I would like to have more support to carry out my volunteer-management responsibilities.	0	1	9	19	11	0	4.00

Consistent with the questionnaire results, fundraisers who participated in the focus group explained that they received no real training in volunteer management but rather learned from their own experience as volunteers. One participant said that they were "just thrown in" but they were eager for information, tools, and training. There was also a recognition among participants that being a good volunteer manager is similar to being a good manager of paid staff except that you may have less time to spend with your volunteers and the nature of the relationship you have with them is more personal.

Both the focus group and the questionnaire results demonstrated a willingness and desire among the fundraisers to receive more training and support for their volunteer-management activities. Of all questionnaire respondents, 67.5 per cent agreed or strongly agreed that they would like to have more training and 75 per cent that they would like to have more support. This

was even more pronounced among staff relatively new to the field (less than five years of experience) with 91.7 per cent (11 of 12 respondents) expressing a desire for more training and 83.3 per cent (10 of 12 respondents) for more support.

The fundraisers' perception of the training, tools, and support available to them is in-line with the actual situation, as described by senior management and the Managing Director, Volunteer Partnerships. When asked what is currently available to fundraisers senior management cited direct-line consultation and technical assistance as well as the availability of some volunteer job descriptions. This is reflected in the results of the questionnaire in the strong indication that fundraisers have someone knowledgeable to turn to for advice. Senior management indicated that they would like to be able to offer fundraisers a toolkit, formal training sessions, and mentorship opportunities and the development of a framework for involving faculty and staff in volunteer engagement activities. Again, this is consistent with the desires of the fundraisers expressed in the questionnaire and in the focus group.

Research question 5. How does senior management assess the current beliefs among fundraisers about volunteer-management and how do they view the current level of skills, knowledge, and commitment to the practice at DAR? This question has been addressed throughout the above sections and will be summarized here. Senior management anticipated that fundraisers would have a reticence toward engaging volunteers derived from a lack of understanding of how to effectively leverage volunteers, a belief that managing volunteers takes up too much time, and that it is not part of their core job description. Through the questionnaire and focus group this was deemed to be unfounded. All 40 respondents to the questionnaire

agreed that working the volunteers should be a priority for DAR, while 97.5 of them believed

volunteers help them to achieve their goals and the goals of their institution, and 92.5 per cent

agreed that working with volunteers is part of their job. Admittedly, 20 per cent indicated that

working with volunteers takes up too much of their time, but this figure is not as widespread as

expected.

Senior management indicated some of the same development opportunities that the

fundraisers themselves highlighted in the focus group. First, being an effective relationship

manager and connector was thought to be of critical importance and relationship management

skills were cited as one training opportunity. Additionally, providing tools and frameworks for

promoting a culture that values volunteerism within faculties and departments was a priority for

senior management, as it was for the fundraisers. Finally, when it came to basic principles of

volunteer management (job descriptions, recruitment and selection, orientation and training,

development and career tracking, recognition, evaluation, and building chemistry and

meaningful relationships), senior management felt these were specific areas in which the

fundraising staff's knowledge and skills could be improved. Like the fundraisers themselves,

they recognized a need for training and support in each of these domains.

Research question 6. Where does senior management want to be in terms of the

volunteer-management program and fundraisers' role within it? During the consultation session

with senior management, a depiction of an ideal state emerged through the ideas described above.

It was not expressed outright in the manner that I present it here, rather I have taken the desires

expressed throughout the conversation and summarized it in a description along three dimensions: the fundraisers, DAR, and the University.

First, in terms of the fundraisers themselves and their beliefs, senior management wants to be in a state where fundraisers recognize that their fundraising and volunteer-management activities are not separate and distinct but rather integrated parts of a whole. Further they would like for the fundraisers to not only recognize this but also understand how to operationalize it in terms of their time management and work planning. With regard to DAR and the services and support it offers for volunteer-management activities, senior management wants to have robust training opportunities for staff who work with volunteers. This would include the offering of formal training, the availability of coaching and mentorship, and a toolkit to support fundraisers' activities, incorporating templates, tools, and other "off the shelf" solutions. Finally, at the University level, senior management wants to operate within a culture and community at McGill in which all faculty, staff, and students recognize the value of volunteers and are willing to participate in engaging them with the University.

The following proposal will address the challenge of integrating volunteer-management activities into the fundraiser's daily routine, as well as skills and knowledge development in the basic principles of volunteer-management. It will make suggestions for essential components of a toolkit for volunteer management and will also suggest special topics that should be addressed through training and development opportunities. Given the scope of the present study, specific strategies for perpetuating a culture of valuing volunteerism will not be broached. However, it will be suggested as a learning goal within the training and development framework.

Training and Professional Development Program

Learning Objectives

Based on the above needs assessment, including the fundraisers' self-reported measures

in the questionnaire, the qualitative information derived from the focus group, and the insight

gained from the senior management consultation, a set of learning objectives will be proposed.

These learning objectives are meant to address the gap between the current and ideal situations

regarding volunteer management at DAR and will form the basis for the proposed training and

development program.

It would seem that, for the most part, fundraisers' beliefs about volunteer management

are consistent with those of senior management, believing in its potential to bring about positive

outcomes and its importance in the DAR context. Where there is a gap in terms of the current

and ideal situations, described both by the fundraisers and by senior management, is in the skills

and knowledge of fundraisers to undertake volunteer-management activities. This is not as much

an issue of confidence in interacting with volunteers; rather the basic principles underlying

volunteer management need to be learned more fully. Therefore the first learning objective

proposed is to:

1. Understand the best practices related to volunteer management and how they can be

    incorporated into the DAR context.

Although fundraisers acknowledged the need to integrate volunteer management into

their fundraising activities and to begin thinking of them as integrated parts of a whole, as this is

not currently common practice, strategies will need to be taught. This was seen as essential by

senior management and was met with agreement in the context of the focus group and as such it

forms the basis for the second learning objective:

2. Understand the different ways to engage volunteers and how this can be integrated into day-

    to-day fundraising activities.

    Another important skill identified by senior management was relationship building. The

focus group participants also brought up the relationship between the volunteer and the

fundraiser as essential to having positive volunteer outcomes. This was seen as especially

relevant in an environment with relatively high turnover as some consistency must be given to

the volunteer in terms of their relationship with the University as a whole. Therefore, the third

learning objective is to:

3. Build relationship-management skills and develop strategies for addressing staff turnover.

    A final overarching theme that was identified through consultation with senior

management and during the focus group was the need to perpetuate a culture that values

volunteerism, encouraging faculty, staff, and students to meaningfully engage with volunteers.

This was seen as a priority for both fundraisers and senior management and as such forms the

basis for the fourth and final learning objective:

4. Develop strategies for building communities and educating about the importance of

    volunteerism.

Training Formats

    With the learning objectives established, the question then becomes, how will these be

met? What are the curriculum and communication vehicles that will allow for learning to take

place? Shushan (2012), in explaining their approach to training refers to an LP (learning process) "defined as a cohesive group of solutions to a need identified collaboratively by the participants and managers in which at least in one of the solutions given, implementation and benefits to the organization are measured" (2012, p. 62). This proposal aims to craft a learning process, based on the needs collectively identified by senior management and the fundraising staff (through the questionnaire and focus group). Following the definition of a learning process, this proposal suggests a multi-pronged approach with offerings that suit different needs and vary in duration.

An important consideration when developing training opportunities and formats is time commitment. Already 20 per cent of fundraisers who responded to the questionnaire indicated that they felt volunteer management took up too much of their time. Additionally, Machin and Paine (2008), in reporting on a national survey of volunteer-management capacity in England, found that "among those respondents who identified potentially useful forms of professional development, there was a tendency to prefer shorter courses and more informal forms of 'training'" (p. 24). This was echoed by Wang and Ashcraft (2012) who, in their review of the literature on nonprofit training, found there to be a preference for training in short-term formats such as workshops or other opportunities that "take a short amount of time to supply significant pieces of information for immediate needs" (p. 126). Training opportunities must take this into account and without neglecting more traditional content delivery methods, also offer shorter, informal, and outcome-driven sessions.

Given the need for a multi-pronged approach, with training formats varying in the time commitment required, a suite of training formats are proposed. The educational content will then be packaged into these vehicles and compiled as part of the comprehensive training plan, described below.   The training formats are as follows:

1.   Training sessions, led by a resident expert

2.   Workshops with specific outcomes

3.   Small group discussions, facilitated by a fundraiser

4.   Special sessions delivered by external experts

5.   Tools, templates, and guidelines (together these will comprise the toolkit)

6.   The identification of a consortium of experts who will be available for coaching

Training sessions. Training sessions will consist of lecture-method sessions whereby a resident expert–someone at DAR with expertise in the given content area–will lead the group in learning a specific concept or skill. These sessions will be organized into four daylong training opportunities, with each day focusing on a different learning objective. The sessions will be planned approximately two months apart so as to space out the time taken away from the participants' day-to-day activities. They will reoccur annually to ensure that new staff has the opportunity to participate in this sessions, regardless of when they are hired. The sessions may be facilitated by the Managing Director, Volunteer Partnerships, another experienced colleague, or several experienced staff may share the teaching responsibilities on a given day.

According to Saks and Haccoun (2010), the lecture method has several advantages including the ability to convey large amounts of information in a limited time and for a limited

cost, the ability to highlight and repeat core concepts, consistency of the message being delivered (because it is being conveyed to a relatively large group of people at the same time), and familiarity for participants. There are however drawbacks in that it does not encourage discussion or active learning, nor does it accommodate different skill levels and learning styles. Saks and Haccoun (2010) suggest that these drawbacks be mitigated by incorporating time for interaction through discussion or activities.

This format, involving resident-experts as facilitators, also leverages the presence of fundraisers with a great depth of experience in volunteer management at DAR. Of those who responded to the questionnaire, 16 had 11 or more years of experience working with volunteers, representing a wealth of knowledge that is easily accessible. During the focus group, a couple of the lesser experienced participants (beginner and intermediate) commented on how they had enjoyed hearing from the experts in the group and would welcome the opportunity to hear more of their experiences. The training session format is an ideal way to offer this.

Workshops. Workshops will be employed when there is a need to generate ideas, content, or tools for use in the fundraisers' individual volunteer-management activities. An example of this would be a workshop on the development of job descriptions. These will be offered as "brown bag" lunch sessions with the first 30 minutes for eating, informal discussion, and the circulation of key principles and templates. The last hour will be focused on developing the product (the goal of the workshop), in collaboration with colleagues. Workshops will be offered on a set of topics on a rotating basis, with new topics added as needed. It is suggested that the Managing Director, Volunteer Partnerships, facilitate these sessions in order to ensure

consistency and adoption of like policies and measures across DAR. The Managing Director, Volunteer Partnerships may seek out other colleagues to aid in the facilitation of the workshops.

Small group discussions. Toward the end of the focus group session, there was general agreement that the discussion group format was an excellent forum for the sharing of ideas, challenges, and successes among colleagues. There was the desire for more such opportunities in small group settings, the focus group being comprised of eight participants. These types of sessions represent opportunities to address special topics and common challenges on an ongoing basis. Saks and Haccoun (2010) affirmed that "group discussions facilitate the exchange of ideas and are good ways to develop critical thinking skills" (p. 169). They also caution against large group discussions as it limits the ability of some to participate actively in the exchange. As such, these groups should not exceed ten participants.

It is suggested that a fundraiser who is interested in the topic lead these sessions. They do not have to be experts in volunteer management as the purpose of the small group sessions is for colleagues to learn from one another, not necessarily from whoever is leading the group. According to Svinicki and McKeachie (2011), "there is a wealth of evidence that peer learning and teaching is extremely effective for a wide range of goals, content, and students of different levels and personalities" (p. 192). A list of topics, identified in the training plan (outlined below) will be compiled and sent to all staff. If they are interested in chairing a discussion, staff will be asked to email the administrative coordinator in the Office of Volunteer Partnerships, with the topic they are interested in and the date and time they would like to hold the discussion group. The administrative coordinator will then email all staff with the date and time, asking those

interested to confirm their attendance with her. She will accept the first nine participants (ten

including the facilitator). If there is great interest, topics can be revisited and staff will be invited

to write in with special topics they want to host so topics can also be refreshed on a regular basis.

Special expert sessions. In addition to leveraging expertise within DAR, when there is

an opportunity to do so, experts from outside McGill will be invited to present to DAR staff.

When budget allows, DAR staff may also be sent to see these presentations outside of McGill,

often in the context of professional development conferences. This type of session represents a

platform to discuss benchmarking across institutions and new ideas or methods in the field of

volunteer management. It will be employed on an ad-hoc basis, as the opportunities present

themselves.

Tools, templates, and guidelines. When there is a need for consistency in best practices

across DAR, tools, templates, and guidelines will be developed and communicated. These

represent the "off the shelf" solutions that were desired by senior management and help to avoid

duplication of efforts through the sharing of standard formats and language. Together, these

documents will form the volunteer-management toolkit and will be made available on Charlotte,

the DAR password-protected intranet. The toolkit documents can then be downloaded and used

by all DAR staff.

To illustrate how tools, templates, and guidelines are distinct take the example of

volunteer recruitment. A possible recruitment tool is a matrix that identifies the range of

attributes that should be sought for a volunteer board. An example of a template used in

recruitment is a recruitment letter that can be personalized to an individual volunteer but with

language that can be reused. Finally, there may be guidelines that govern how recruitment

should take place (e.g., a current Faculty Advisory Board volunteer should not be recruited to

participate in a second Faculty Advisory Board).

    Resident-expert coaching. Given the depth of experience present at DAR, it is proposed

that experts in different aspects of volunteer management be identified and made available for

one-on-one coaching of their colleagues. The idea of an in-house network of mentors and

coaches was presented by Gay (2001) who chaired a focus group of volunteer managers of local

branches of national nonprofits in England. He used the voice of one of his focus group

participants to explain the rationale behind it. He stated,

> All of us (volunteer managers) have certain expertise in certain areas and we've got
>
> weaker or blind spots in others and I'm sure that some of the people round this table
>
> would have solutions for some of the problems I've had. I think that if we could get a
>
> network of mentors . . . . You could work alongside somebody to look at a specific area
>
> of your work which you needed training in, that would be good because I think there's an
>
> awful lot of expertise wasted really, the information and knowledge is there, but we don't
>
> tap into it really, maybe mentoring might be a way of doing it . . . . (p. 20)

Saks and Haccoun (2010) describe coaching as "a training method in which a more

experienced and knowledgeable person is formally called upon to help another person develop

the insights and techniques pertinent to the accomplishment of their job" (p. 208). They also

affirm that its use is increasing as coaching has been effective in skills and performance

enhancement. This type of learning opportunity would be appropriate if ad-hoc issues arise or a

fundraiser is dealing with a particularly delicate or timely issue that they need immediate guidance on.

Consideration must be given to the people who would act as coaches, their needs and core responsibilities. Experts would need to be recruited and would have to consent to being given the status of coach. If this responsibility began detracting from their core responsibilities the coach would know to flag this to the Managing Director, Volunteer Partnerships, as it would be indicative of a greater issue. If the coach were receiving a large amount of inquiries about a given subject it would necessitate a training session or workshop on the topic.

Recommended text. A recommended book to have available to fundraisers in support of and in supplement to these training and development opportunities is *Volunteer Administration: Professional Practice* edited by Keith Steel (2010). According to a review by Sengupta (2011), "one of the central values of the book as an edited collection is the fact that the arguments are coherent within each chapter, and consequently each chapter can be read alone" (p. 92). As such, it is an ideal resource for volunteer-managers with other responsibilities and competing priorities. They do not need to commit to reading an extensive summary of volunteer administration practices but rather can select aspects of the profession they would like to develop their knowledge of and build their overall understanding incrementally.

Proposed Training and Development Plan

Using the training formats, outlined above, the following training and development plan aims to address each of the learning objectives. Although these are targeted at the specific needs

of fundraising staff, much of the content would be applicable to other DAR staff who work with volunteers and as such the sessions should be open to all.

The training plan was developed based on the learning objectives that were subdivided into special topics. For each of these topics, the range of training formats was considered and those applicable to the topic were leveraged to build learning and understanding in that specific content area. This plan is summarized in appendix F and is explained below.

Learning objective 1. The first learning objective is to understand the best practices related to volunteer management and how they can be incorporated into the DAR context. This learning objective is by far the most content-heavy and as such was divided into several topics: volunteer satisfaction and retention, job descriptions, recruitment and selection, orientation and training, development and career-tracking, recognition and motivation, and evaluation.

A full day training session is suggested to facilitate content delivery based on all the topics above. The day's program will consist of several lecture-format presentations, supplemented by discussion, around these topics. A description of the program follows below. Each session title is followed by a list of tools, templates, and guidelines that complement the lecture and will be made available during the session and afterwards on the DAR intranet.

9:00 to 9:30 AM	Introduction to volunteer-management
	Tool: volunteer satisfaction survey Guideline: code of ethics
9:30 to 10:30 AM	Identifying and recruiting the right volunteers
	Tool: committee composition guide Template: recruitment letter/call scripts Guideline: policy on volunteer recruitment

10:30 to 10:45 AM   Break

10:45 to 11:30 AM   Defining training needs - what do volunteers need to know about McGill, DAR, and the job they will be doing?

                         Tool: orientation guides to McGill and DAR
                         Template: sample mandates, expectations, contracts, confidentiality agreements
                         Guideline: volunteer handbook

11:30 to 12:30 PM   Planning for volunteers' professional development at DAR

                         Tool: sample volunteer career tracks
                         Guideline: limits for the amount of time a volunteer can be employed in the same role

12:30 to 1:30 PM   Lunch

1:30 to 2:30 PM   Understanding volunteer motivations and utilizing intrinsic and extrinsic rewards

                         Tool: DAR-wide recognition opportunities
                         Template: membership certificates, gifts
                         Guideline: policy on the appropriateness of various forms of recognition depending on the nature of the volunteer activity

2:30 to 3:30 PM   Defining volunteer success and deciding when to sunset a volunteer

                         Tool: list of potential criteria for an evaluation grid, a mechanism for receiving and acting upon feedback from volunteers
                         Template: sample evaluation grids and performance standards
                         Guideline: non-negotiable volunteer evaluation parameters

3:30 to 5:00 PM   Informal discussion

To further address the topics highlighted under learning objective 1, several workshops are proposed. These include drafting job descriptions; defining desired qualities, attributes, and skills for the purpose of populating the "committee composition grid"; brainstorming orientation

and training opportunities; defining volunteer engagement opportunities by time commitment,

level of responsibility, and experience required; brainstorming ways to recognize volunteers on a

personal or group level; and creating an evaluation grid for the volunteer and the volunteer-

manager. As described above, it is important that these workshops have specific outcomes to

ensure that time is used effectively. Several tools, templates and guidelines will be used in these

workshops, as illustrated in appendix F.

 Learning objective 2. The second learning objective identified through the needs

assessment is to understand the different ways to engage volunteers and how this can be

integrated into day-to-day fundraising activities. This was subdivided into four topics:

identification of volunteer engagement opportunities, alignment of fundraising and volunteer

goals, working with demanding volunteers, and time management.

 The format of the training session for learning objective 2 is similar to that for the first

objective. The content and topics pertaining to this objective are somewhat less content heavy

and more about developing strategies and a new perspective toward volunteer-management

activities. As such, a workshop and special expert session will be integrated into this training

day. Also, this session will only be half of a day and a description of the program follows below.

Again, the tools, templates, and guidelines that complement the lecture will be made available

during the session and afterwards on the DAR intranet.

9:00 to 10:00 AM	Recall "Introduction to Volunteer Management" and identification of different kinds of volunteers
	Guideline: list of roles that a volunteer can fill
10:00 to 11:00 AM	Leveraging volunteer partnerships to meet your goals

11:00 to 11:15 AM	Break
11:15 to 12:15 AM	Special expert session: Tales from the Neuro[1]
12:15 to 12:30 PM	Introduction of lunchtime workshop
12:30 to 2:00 PM	Workshop: What are you struggling with and how can a volunteer help?

Note1: The Montreal Neurological Institute (the Neuro) is an example of an organization that relies heavily on volunteers and does not distinguish between volunteer and fundraising activities. Their perspective and insight, as someone who works within the McGill context, will be valuable in learning how to integrate volunteer-management into fundraising goals.

Learning objective 3. The third learning objective is to build relationship-management skills and develop strategies for addressing staff turnover. Again, this is divided into four topics: ingredients of an effective relationship, listening and communicating, making meaningful connections, and managing through turnover. These will be presented during a half-day training session that will incorporate a lunchtime workshop. The program is as follows:

9:00 to 9:45 AM	What makes a productive relationship?
9:45 to 10:30 AM	What makes a meaningful relationship?
10:30 to 10:45 AM	Break
10:45 to 11:45 AM	The challenges of turnover and how to manage through them
	Template: letter and call scripts to address turnover, farewell letters and call scripts
11:45 to 12:00 PM	Introduction of lunchtime workshop

| 12:00 to 1:30 PM | Workshop: finding inspiration: brainstorm ways to meaningfully connect your volunteers to the institution and to each other |

Learning objective 4. The fourth and final learning objective is to develop strategies for building communities and educating about the importance of volunteerism. As with the other objectives, it is divided into topics including: defining your community and internal champions, communicating volunteer impact, making meaningful connections, and involving your community in volunteer engagement. This training session will be a full day and will incorporate several shorter workshops throughout, as opposed to the typical lunchtime format. It will emphasize the sharing of ideas to develop strategies and the application of concepts to each fundraiser's specific situation. The program is as follows:

9:00 to 9:30 AM	Finding internal champions: who can articulate your cause?
	Tool: checklist of attributes to look for in internal champions
9:30 to 10:00 AM	Workshop (in breakout groups): brainstorming key participators
10:15 to 10:30 AM	Break
10:30 to 11:15 AM	Developing key messages for communicating volunteer impact
	Tool: facts and figures on the impact of volunteerism at McGill and across Canada and North America
11:15 to 11:45 AM	Workshop (in breakout groups): finding communication vehicles that will reach your internal community
11:45 to 12:00 PM	Recall "What makes a meaningful relationship" and introduction of lunchtime workshop
12:00 to 1:30 PM	Workshop: brainstorming: where can you have a presence within your internal community?

1:30 to 2:30 PM	The role your internal community and champions play in volunteer engagement
	Tool: typical opportunities to involve internal constituents in volunteer engagement
	Template: letter templates and call scripts, asking for participation in volunteer engagement
2:30 to 3:00 PM	Workshop (in breakout groups): finding opportunities to engage your internal community
3:00 PM	Informal discussion and sharing of ideas

Small group discussions. In addition to the workshops and training sessions outlined above, small group discussion topics have also been identified (see appendix F). As previously described, these topics may reoccur and others may be added based on demand. The preliminary slate of topics include:

- What do volunteers want and why do they volunteer?

- Saying "no" to potential volunteers

- Involving faculty, staff, and students in volunteer orientation

- Challenges in volunteer development and succession planning

- The relative challenges of recognizing intrinsically and extrinsically motivated volunteers

- The challenges of sunsetting volunteers

- Stories of successful volunteer engagement

- How to involve volunteers in your day-to-day

- Strategies for managing demanding volunteers

- Challenges in time management

- Challenges in building volunteer relationships

- Stories of successful volunteer relationships and how they were built

- Challenges and successes in maintaining a strong relationship through staff turnover

Special expert sessions. There are two topics–time management and listening and communicating–that are not specific to volunteer management. In these cases, instead of having a volunteer-management or fundraising expert speak to these, it is suggested that a consultant or specialist be invited to teach this content. Other special expert sessions related specifically to volunteer management might also be planned as the opportunity arises.

Implementation Strategy

Clearly, there is a wealth of content to deliver and much learning that can take place in the context of the proposed training and development program. This cannot all happen at once but rather must be phased in and then maintained so as to meet the needs of new employees as they join DAR. Appendix G provides an implementation calendar with suggested timing for each of the four major training sessions, the introduction of the small group discussions, and the offering of the workshops pertaining to the first learning objective. As can be seen, the proposed start for these training activities is fall 2013 and it will require a full year before implementation is complete. Therefore, in fall 2014 the effectiveness of these training measures should be evaluated and their format, content, and delivery modified as needed.

Evaluation of Training Program

Given the time and resources that will go into this training program, both on the part of the training facilitators and the fundraisers, it is important to evaluate its effectiveness. Saks and Haccoun (2010) describe two forms of training evaluation: formative and summative. Formative

evaluations focus on improving the training itself, the content delivery methods, and the learning experience. It is suggested that following each training opportunity, a short survey be given to participants to evaluate and provide feedback on its effectiveness. The focus of the evaluation will be on the format of the training opportunity, its duration, and the perceived impact. An evaluation form is provided in appendix H.

Summative evaluation seeks to understand whether the training has been effective in meeting its goals. In this case, have volunteer relationships been improved through a better understanding of the principles of volunteer management by fundraising staff? Do fundraisers view their volunteer management activities as essential to and part of their fundraising mandate? Have fundraisers become more successful in building relationships and making meaningful connections? Are volunteers being more meaningfully engaged in communities across the University? To assess whether these outcomes have been achieved, feedback from fundraising staff should be solicited through a questionnaire. Additionally, volunteers themselves should be asked if they have witnessed an improvement in their interactions with the University.

Conclusions

Volunteers are a valuable resource, particularly for non-profit institutions as they willingly and freely contribute valuable resources in terms of skills, time, and financial support. The importance of ensuring volunteer satisfaction and retention through a well-managed volunteer program cannot be underestimated. Ensuring that systems are in place to effectively recruit, train, develop, recognize, and evaluate volunteers is essential to ensuring a mutually beneficial and positive relationship.

The assessment of the current state of volunteer management in McGill Development and Alumni Relations demonstrated that the fundraisers and senior management are in agreement as to the importance of volunteer partnerships in ensuring the organization can meet their goals. Both groups also agreed upon critical challenges at DAR including developing a better understanding and processes to undertake basic volunteer-management activities, integrating volunteer management more holistically into fundraising activities, building relationship management skills, and fostering a culture across McGill that values involvement in volunteer engagement. These challenges represent the gaps between the current and ideal states of volunteer management at DAR and are addressed through the introduction of a comprehensive training program for fundraisers and the development and dissemination of tools, templates, and guidelines to guide volunteer-management activities.

It is anticipated that with the adoption of the proposed training program, fundraisers will develop a better understanding of the core principles of volunteer management and be more successful in integrating these tasks into their daily fundraising activities. It is also hoped that this program will give those new to DAR, and new to volunteer management, a solid foundation on which to build their experience in this area. Once this has been achieved, the training program evaluated and modified as needed, more attention can be placed on formal training for volunteers; providing them with the tools they need to engage with McGill in a way that will be meaningful to them and to shape their own experiences.

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Appendix A
Questionnaire on Volunteer Management at DAR

Questionnaire on Volunteer-Management at DAR

PARTICIPANT CONSENT FORM

As a member of the advancement staff at McGill University, you have been invited to participate in a research study on volunteer-management at DAR. In the course of completing this questionnaire you will be asked basic questions about your role and experience at DAR and in the field of development as well as your level of involvement in volunteer-management activities. Additionally, you will be presented with statements about volunteer-management and will be asked to indicate your level of agreement with them. The statements fall into three categories: beliefs and attitudes, skills and knowledge, and tools and support. Finally, you will have the opportunity to submit your overall comments and impressions of the program.

The goal of this questionnaire is to achieve an overall understanding of the current state of volunteer-management at DAR and of the training and support that is required to assist fundraising staff to undertake volunteer-management responsibilities.

Although you will be asked to respond to basic questions about your role and experience at DAR, you will not be asked to provide any identifying information. All responses are anonymous, no names will be used and your responses will not be tied to you in any way. As responses are anonymous, survey data will not be tied to any individuals but rather will be compiled to achieve a complete picture of volunteer management at DAR. Compiled responses will be analyzed to identify trends and patterns and combined with third-party research and analysis to develop a proposal for improving the volunteer partnerships program at DAR through staff training and tools.

The compiled results of the survey will appear in a research paper that will be available electronically at the McGill University Library. The results will also be shared with departments within DAR and may be shared with the membership of relevant professional organizations.

It is estimated that it will take ten minutes to complete the survey.

Participants are under no obligation to participate. Survey responses for each page are submitted when the "next" button is pressed however you can exit the survey at any time and only questions answered thus far may be included in the overall results.

By completing and submitting the questionnaire you agree to have your responses included in the data, as described above.

Thank you for your participation.

Researcher: Ashleigh Manktelow (ashleigh.manktelow@mail.mcgill.ca),
Master's Student, Faculty of Education, McGill University

Research supervisor: Prof. Bruce M. Shore (bruce.m.shore@mcgill.ca)

Sponsored by the Office of Volunteer Partnerships, McGill University.

If you have any questions or concerns regarding your rights or welfare as a participant in this research study, please contact the McGill Ethics Officer at 514-398-6831 or lynda.mcneil@mcgill.ca

You are encouraged to print this form for your records.

Questionnaire on Volunteer-Management at DAR

*I work in

○ A Faculty or Department

○ DAR central

○ A region

*I have worked at DAR for

○ Less than 2 years

○ 2-4 years

○ 5-7 years

○ 8-10 years

○ 11-14 years

○ 15 or more years

*I have worked as a fundraiser for

○ Less than 2 years

○ 2-4 years

○ 5-7 years

○ 8-10 years

○ 11-14 years

○ 15 or more years

○ My primary responsibility is not fundraising.

*I currently manage or participate in the management of at least one volunteer or volunteer group.

○ Yes

○ No

Questionnaire on Volunteer-Management at DAR

*I have worked with volunteers for

- ○ Less than 2 years
- ○ 2-4 years
- ○ 5-7 years
- ○ 8-10 years
- ○ 11-14 years
- ○ 15 or more years

*Please indicate the percentage of your time allocated to volunteer-management activities.

- ○ Less than 10%
- ○ 10-15%
- ○ 16-20%
- ○ 21-25%
- ○ More than 25%

*Please indicate the percentage of your time you believe should be allocated to volunteer-management activities.

- ○ Less than 10%
- ○ 10-15%
- ○ 16-20%
- ○ 21-25%
- ○ More than 25%

Questionnaire on Volunteer-Management at DAR

✱ You have indicated that you do not currently manage or participate in the management of at least one volunteer or volunteer group.

If you however have past volunteer-management experience you can still respond to the survey based on your beliefs and past experience. If a question is not relevant to you, please select "N/A".

○ I have past volunteer-management experience.

○ I have never worked with volunteers.

Questionnaire on Volunteer-Management at DAR

BELIEFS AND ATTITUDES

✱ Please indicate your level of agreement with the following statements.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	N/A
Volunteer-management is part of my job.	○	○	○	○	○	○
Volunteers help me achieve my goals and the goals of my institution.	○	○	○	○	○	○
Managing volunteers takes up too much of my time.	○	○	○	○	○	○
Volunteers are too demanding.	○	○	○	○	○	○
I enjoy working with volunteers.	○	○	○	○	○	○
I have a responsibility to the volunteers I work with.	○	○	○	○	○	○
Developing strong volunteer partnerships should be a priority for DAR.	○	○	○	○	○	○

Questionnaire on Volunteer-Management at DAR

SKILLS AND KNOWLEDGE

*Please indicate your level of agreement with the following statements.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	N/A
I have all the requisite skills to effectively manage volunteers and volunteer groups.	○	○	○	○	○	○
I am confident in my interactions with volunteers.	○	○	○	○	○	○
Managing volunteers has led to positive outcomes for me as it pertains to my work.	○	○	○	○	○	○
I know what my volunteers need and how to deliver it.	○	○	○	○	○	○
The volunteers that I manage feel supported, fulfilled, and a sense of pride in their work.	○	○	○	○	○	○
I maintain an appropriate level of communication with my volunteers.	○	○	○	○	○	○
Volunteer engagement has allowed me to engage McGill alumni, donors, and friends in meaningful ways.	○	○	○	○	○	○

*Please indicate your level of confidence with your ability to carry out the following volunteer-management activities.

	Not Confident	Somewhat Confident	Confident	Very Confident	N/A
Defining volunteer job descriptions	○	○	○	○	○
Volunteer recruitment	○	○	○	○	○
Volunteer orientation and training	○	○	○	○	○
Volunteer development/career tracking	○	○	○	○	○
Volunteer recognition	○	○	○	○	○
Volunteer evaluation	○	○	○	○	○

Questionnaire on Volunteer-Management at DAR

TOOLS AND SUPPORT

✱ Please indicate your level of agreement with the following statements.

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree	N/A
I am well-prepared to undertake volunteer-management related tasks.	○	○	○	○	○	○
I received sufficient training to be able to take on volunteer-management responsibilities successfully.	○	○	○	○	○	○
There are adequate tools, templates, and information available to me to ensure I can maintain positive volunteer relationships.	○	○	○	○	○	○
When I have a difficult volunteer-management situation to deal with I have someone knowledgeable I can speak to for advice.	○	○	○	○	○	○
I would like to have more training on how to carry out my volunteer-management responsibilities.	○	○	○	○	○	○
I would like to have more support to carry out my volunteer-management responsibilities.	○	○	○	○	○	○

Questionnaire on Volunteer-Management at DAR

OVERALL IMPRESSIONS

Please submit any other comments you have about volunteer-management at DAR.

Appendix B
Questionnaire Recruitment Emails

Ashleigh Manktelow

From:	Ashleigh Manktelow
Sent:	Wednesday, February 20, 2013 2:40 PM
To:	ashleigh.manktelow@mail.mcgill.ca
Cc:	Bruce M. Shore, Prof.; Royal Govain, Mr.
Subject:	Working with volunteers

Dear Colleagues,

I am writing to you as staff tasked with meeting the University's fundraising needs, and who may engage volunteers to help you reach this objective. Working with volunteers to achieve our organizational objectives can be a very rewarding experience but can also involve significant challenges.

It is with this in mind that I am undertaking research to better understand your perspective on the benefits and challenges of working with volunteers. It is expected that an understanding of the current situation will guide the development of tools and training to help you leverage meaningful volunteer relationships. The Office of Volunteer Partnerships has endorsed this study.

Please take a moment to complete this short survey https://www.surveymonkey.com/s/dar-volunteer. It is estimated that it will take ten minutes from start to finish. All responses are anonymous and will be compiled to achieve a complete picture of volunteer management at DAR. The compiled results of the survey will appear in a research paper that will be available electronically at the McGill University Library. The results will also be shared with departments within DAR and may be shared with the membership of relevant professional organizations.

As the submissions are anonymous, no names will be used and your responses will not be tied to you in any way.

If you have any questions please let me know.

Thank you for your time.

Ashleigh Manktelow

Principal Investigator: Ashleigh Manktelow (ashleigh.manktelow@mail.mcgill.ca),
Master's Student, Faculty of Education, McGill University

Research supervisor: Prof. Bruce M. Shore (bruce.m.shore@mcgill.ca)

Sponsored by the Office of Volunteer Partnerships, McGill University.

Dear Colleagues,

As a follow-up to our recent discussions about the importance of volunteer partnerships, I encourage everyone who received an invitation, if you have not already done so, to participate in the survey on volunteer-management at DAR that was circulated by Ashleigh. The survey can be found here: https://www.surveymonkey.com/s/dar-volunteer

This message is carefully worded so as not to contradict research ethics and protocols for the integrity of this important study.

It is at my own initiative that I am sending this message. I am personally happy to be helping Ashleigh with this study as it will help develop a better understanding of the current status of the volunteer program at DAR and how we can provide tools and support to leverage these relationships more effectively.

Although I am the Director of Volunteer Partnerships, no-one should regard this as an administrative memo and know that I am not privileged with information about the survey nor will I or anyone else see any responses that could be linked to a particular individual.

Many thanks.

Cordially,
-Royal

Royal A. Govain
Managing Director, Volunteer Partnerships
Directeur administratif, Partenariats bénévoles

McGill University
Development & Alumni Relations

Ashleigh Manktelow

From:	Ashleigh Manktelow
Sent:	Monday, March 11, 2013 5:12 PM
To:	ashleigh.manktelow@mail.mcgill.ca
Cc:	Bruce M. Shore, Prof.; Royal Govain, Mr.
Subject:	Working with volunteers (follow-up)

Dear Colleagues,

Thank you to all those that have completed this survey on working with volunteers at DAR. If you have not already done so, your participation would be greatly appreciated. The survey will close at the end of the week, Friday, March 15.

https://www.surveymonkey.com/s/dar-volunteer

Details are repeated below.

Thank you once again for your time,

Ashleigh

From: Ashleigh Manktelow
Sent: Wednesday, February 20, 2013 2:40 PM
To: ashleigh.manktelow@mail.mcgill.ca
Cc: Bruce M. Shore, Prof.; Royal Govain, Mr.
Subject: Working with volunteers

Dear Colleagues,

I am writing to you as staff tasked with meeting the University's fundraising needs, and who may engage volunteers to help you reach this objective. Working with volunteers to achieve our organizational objectives can be a very rewarding experience but can also involve significant challenges.

It is with this in mind that I am undertaking research to better understand your perspective on the benefits and challenges of working with volunteers. It is expected that an understanding of the current situation will guide the development of tools and training to help you leverage meaningful volunteer relationships. The Office of Volunteer Partnerships has endorsed this study.

Please take a moment to complete this short survey https://www.surveymonkey.com/s/dar-volunteer. It is estimated that it will take ten minutes from start to finish. All responses are anonymous and will be compiled to achieve a complete picture of volunteer management at DAR. The compiled results of the survey will appear in a research paper that will be available electronically at the McGill University Library. The results will also be shared with departments within DAR and may be shared with the membership of relevant professional organizations.

As the submissions are anonymous, no names will be used and your responses will not be tied to you in any way.

If you have any questions please let me know.

1

Appendix C
Questions and Timing to Guide Focus Group Discussion

WELCOME (9:30-9:35)

- Thank you all for being here and taking the time to participate

- Royal is here as an observer and representative of the Office of Volunteer Partnerships

- None of what you say will be tied to you in any way. Although the composition of the group may be known, statements or opinions expressed will not be attributed to any one individual in the formal write-up and by signing the consent forms you too have agreed not to attribute comments to specific people.

- This is meant to be a dialogue and exchange of ideas. I hope that there will be discussion among you so please respond to one another, and feel free to express differing opinions.

- Feel free also to get up and help yourself to refreshments at any time. This is really supposed to be informal.

- We will respect the time limits of this session, I know everyone is very busy, so it will end at 11 a.m. Because time is limited, I may refocus the conversation from time to time so we can cover all the topics that I have set out for today.

- So, let's begin!

INTRODUCTION (9:35-9:45)

1. What are the different ways you currently work with volunteers? (advisory groups, project groups, one-on-one)

2. Would you classify yourself as beginner, intermediate or experienced when it comes to volunteer-management?

3. Why do you work with volunteers? *What do you think you can accomplish with volunteers more effectively than on your own?*

4. What does successful volunteer engagement look like?

5. What are the outcomes of successful volunteer engagement?

WHAT IS THE CURRENT STATE OF VOLUNTEER MANAGEMENT IN MCGILL DEVELOPMENT AND ALUMNI RELATIONS (DAR)? (9:45-10:20)

1. How would you describe the current attitude on volunteer-management at DAR?

2. Is this consistent with your own beliefs?

3. Do you think DAR is currently using volunteer partnerships effectively and successfully?

4. Do you think that you leverage volunteer partnerships more or less effectively than most? Why do you think that is? What do you do differently?

5. How do you balance your time between working with volunteers and carrying out your fundraising duties?

6. How would you evaluate your current volunteer-management skills?

7. Do you employ formal processes or templates in your volunteer engagement activities?

8. Where or how did you learn how to manage volunteers?

9. What have you learned about managing volunteers through your experience at DAR?

10. I have done some research on volunteer-management and consulted with Royal and others and have identified several dimensions or steps in volunteer-management. I want

to take a moment to speak specifically about them so I have a summary sheet for each of you. This includes:

- Job descriptions
- Recruitment and selection
- Orientation/training
- Development/career tracking
- Recognition
- Evaluation
- Building chemistry/meaningful relationships

a. Do you think anything is missing from this list?

b. Which of these do you think you most excel at?

c. Which of these do you want more support undertaking?

d. Which of these do you think is most critical to success in volunteer-management?

11. What tools, support and training are currently available to you to assist with your volunteer-management activities overall?

WHAT IS THE DESIRED STATE OF VOLUNTEER MANAGEMENT IN DAR, FROM THE PERSPECTIVE OF THE FUNDRAISERS? (10:20-10:40)

1. Is there a scenario (however unlikely) that would nullify DAR's need to engage volunteers (i.e. the ability to hire extra fundraising staff)?

2. What do you think DAR senior management's expectations are of you in terms of engaging volunteers?

3. What would you like to change about the way you currently interact with volunteers?

4. If you could wave a wand and create an ideal climate at DAR to support you in your volunteer-management activities, what would it look like?

WHAT PROFESSIONAL DEVELOPMENT, TRAINING, SUPPORT, AND TOOLS SHOULD BE PUT IN PLACE? (10:40-11)

1. When you were hired, did you feel well-equipped to work with volunteers? Do you now? What changed?

2. What support do you need to be able to take full advantage of the benefits of volunteer partnerships?

3. What specific tools would be helpful to you in your work with volunteers?

4. How would you distinguish between support and training?

5. What format would you like volunteer-management training to take?

    a. Provision of reference materials (independent study)

    b. Group workshops

    c. Lectures/guest speakers

    d. Conference attendance

    e. One-on-one coaching

6. Do you have any other insights into volunteer-management at DAR that you would like noted?

Appendix D
Focus Group Recruitment Email

Ashleigh Manktelow

From:	Ashleigh Manktelow
Sent:	Friday, March 08, 2013 10:51 AM
To:	████████████████
Cc:	Bruce M. Shore, Prof.; Royal Govain, Mr.
Subject:	Focus Group on Volunteer Management

D█████████,

As a follow-up to the recent survey on volunteer management, I would like to ask you to participate in a focus group on the same topic, alongside several of your colleagues. The session will be moderated by me, with the goal of getting a better understanding of your opinions on and experiences with volunteer management, as well as what support you think is needed from DAR to help you meaningfully engage volunteers.

The focus group will take place on March 19 from 9:30-11:00 a.m. in the large boardroom at Martlet House. Please let me know if you are available to participate and thank you in advance for your time.

Best regards,
Ashleigh

Principal Investigator: Ashleigh Manktelow (ashleigh.manktelow@mail.mcgill.ca),
Master's Student, Faculty of Education, McGill University

Research supervisor: Prof. Bruce M. Shore (bruce.m.shore@mcgill.ca)

Sponsored by the Office of Volunteer Partnerships, McGill University.

Appendix E
Senior Management Consultation Guiding Questions

1. What are the major gaps you see in where we want to be at DAR in terms of volunteer-management and where we are today?

2. What responsibilities do fundraisers have in volunteer-management? What are the expectations of them in this regard?

3. What percentage of fundraising staff time do you think should be devoted to managing volunteers?

4. What percentage of fundraising staff time do you think is currently devoted to managing volunteers?

5. Why do you think this is more/less than the ideal?

6. Is experience working with volunteers something that you look for when hiring fundraising staff? Is it part of the job description?

7. How would you describe the outcomes and process of volunteer-management at the Faculty level? Successful? Needs improvement?

    a. What about centrally?

    b. And in regions?

8. Do you think that as a whole DAR fundraising staff have the requisite skills and knowledge to manage volunteers?

9. How do you assess the current beliefs among fundraisers about volunteer-management?

10. Do you think that overall, our volunteers have a positive experience working with fundraising staff?

11. How do you think we fare as an organization with the following volunteer-management activities and how could they be improved (either centrally or at the unit level, or both):

    a. Job descriptions

    b. Recruitment

    c. Selection – can we say "no"?

    d. Orientation/training

    e. Development/career tracking

    f. Recognition

    g. Evaluation

    h. Building chemistry/meaningful relationships

12. What are the criteria you would apply to evaluating a volunteer?

    a. Attended volunteer meetings?

    b. Facilitated connections?

    c. Offered skills/services?

    d. Made philanthropic contribution?

    e. Other

13. What tools, support, and training is available to fundraisers carrying out volunteer-management activities?

14. What tools, support, and training would you like to have available to them?

15. What format do you envision training opportunities taking (note this will also be asked of the focus group and based on best practices)?

    a. Workshops, brown bags, conference attendance, independent study

Appendix F
Volunteer Management Training and Development Plan

Learning Objective	Topic	Training Session	Workshop	Small Group Discussion	Tool	Template	Guideline	Special Expert Session
Understand the best practices related to volunteer management and how they can be incorporated into the DAR context	Volunteer satisfaction and retention	Introduction to volunteer-management		What do volunteers want and why do they volunteer?	Volunteer satisfaction survey		Codes of ethics	
	Job descriptions		Drafting job descriptions			Template job descriptions by volunteer job type; Qualifications and pre-requisites	Essential components of a job description	
	Recruitment and selection		Defining desired qualities, attributes and skills (for populating the "composition grid")	Saying "no" to potential volunteers	Committee composition guide	Recruitment letter text/call scripts	Policy on recruiting volunteers	
			Identifying and recruiting the right volunteers					
	Orientation and training		Defining training needs - what do volunteers need to know about McGill, DAR, and the job they will be doing	Involving faculty, staff, and students in volunteer orientation	Orientation to DAR and McGill guides	Sample Mandates Expectations Contracts Confidentiality agreements	Volunteer handbook	
			Brainstorming orientation and training opportunities					
	Development and professional career tracking		Defining volunteer engagement					
			Planning for volunteers' opportunities by time commitment, level of responsibility, and experience required				Limits for the amount of time a volunteer can be employed in the same role	
			Development and professional development at DAR	Challenges in volunteer development and succession planning	Sample volunteer career tracks			

Learning Objective	Topic	Training Session	Workshop	Small Group Discussion	Tool	Template	Guideline	Special Expert Session
	Recognition and motivation	Understanding volunteer motivations and utilizing intrinsic and extrinsic rewards	Brainstorming ways to recognize volunteers on a personal or group level	The relative challenges of recognizing intrinsically and extrinsically motivated volunteers	DAR-wide recognition opportunities, such as an event	Membership certificates for volunteers on certain committees Gifts appropriate for volunteer recognition	Policy on the type and scope of recognition appropriate depending on the volunteer role and length of service	
	Evaluation	Defining volunteer success and deciding when to sunset a volunteer	Creating an evaluation grid for the volunteer and the volunteer-manager	The challenges of sunsetting volunteers	List of potential criteria for an evaluation grid A mechanism for receiving and reporting on feedback from volunteers	Sample evaluation grids Performance standards	Non-negotiable volunteer evaluation parameters	
Understand the different ways to engage volunteers and how this can be integrated into day-to-day fundraising activities	Identification of volunteer engagement opportunities	Recall "Introduction to Volunteer Management" - different kinds of volunteers	What are you struggling with and how can a volunteer help?	Stories of successful volunteer engagement			List of roles that a volunteer can fill	
	Alignment of fundraising and volunteer goals	Leveraging volunteer partnerships to meet your goals		How to involve your volunteers in your day-to-day?				
	Working with demanding volunteers			Strategies for managing demanding volunteers				Guest speaker from the Neuro

Learning Objective	Topic	Training Session	Workshop	Small Group Discussion	Tool	Template	Guideline	Special Expert Session
	Time management			Challenges in time management				Specialist on time management
Build relationship-management skills and develop strategies for addressing staff turnover	Ingredients of an effective relationship	What makes a productive relationship?		Challenges in building volunteer relationships				
	Listening and communicating					Letter and script templates for communicating with volunteers		Specialist on listening and communication skills
	Making meaningful connections	What makes a meaningful relationship?	Finding inspiration: brainstorm ways to meaningfully connect your volunteers to the institution and to each other	Stories of successful volunteer relationships and how they were built				
	Managing through turnover	The challenges of turnover and how to manage through them.		Challenges and successes in maintaining a strong relationship through staff turnover		Letter and call scripts to address turnover Farewell letters and call scripts		

Learning Objective	Topic	Training Session	Workshop	Small Group Discussion	Tool	Template	Guideline	Special Expert Session
Develop strategies for building communities and educating about the importance of volunteerism	Defining your community and internal champions	Finding internal champions: who can articulate your cause?	Brainstorming key participators	Challenges and triumphs of working with internal champions	Checklist of attributes to look for in internal champions			
	Communicating volunteer impact	Developing key messages for communicating volunteer impact	Finding communication vehicles that will reach your internal community	How to communicate to internal constituents	Facts and figures on the impact of volunteerism at McGill and across Canada and North America			
	Making meaningful connections	Recall "What makes a meaningful relationship?"	Brainstorming: where can you have a presence?					
	Involving your community in volunteer engagement	The role your internal community and champions play in volunteer engagement	Finding opportunities to engage your internal community	Recall "Challenges and triumphs of working with internal champions"	Typical opportunities to involve internal constituents in volunteer engagement	Letter templates and call scripts, asking for participation in volunteer engagement		

Appendix G
Training and Development Plan Implementation Calendar

September 2013
Training session for learning objective 1
Toolkit (tools, templates, and guidelines) made available on the DAR intranet

October 2013
Workshops
- Drafting job descriptions
- Defining volunteer engagement opportunities
- Building the committee composition grid (for recruitment)

November 2013
Workshops
- Brainstorming orientation and training opportunities
- Brainstorming ways to recognize volunteers
- Creating an evaluation grid for the volunteer and the volunteer-manager

December 2013
Recruitment of expert coaches

January 2014
Training session for learning objective 2
Introduction of special topics and small group discussion format
Introduction of the consortium of coaches

February 2014
Small group discussions begin (to occur as frequently as warranted)
Guest speaker on time-management

March 2014
Training session for learning objective 3

April 2014
Guest speaker on listening and communications skills

May 2014
Training session for learning objective 4

June – August 2014
Workshops reprieved by demand

September 2014
Evaluation of training program

Appendix H
Training Evaluation Form

Training Evaluation

Training Format:
☐ Lecture-Style Training ☐ Workshop ☐ Small Group Discussion ☐ Expert Session

Date:_____   Time:_____

Topic:_____

Please answer the following questions using the scale below:
1. strongly disagree 2. disagree 3. neither agree nor disagree 4. agree 5. strongly agree

_____The format of the session was appropriate given the content presented

_____The format of the session suited my needs

_____The session was an appropriate length of time

_____All of my questions were addressed

_____I gained significant new knowledge

_____I developed skills in the area

_____I was given tools for attacking problems

_____I am leaving this session with ideas that I can apply to my work

Please share any additional comments below: