

# Volunteering

Karl E. Burgher; Michael B. Snyder



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# Volunteering

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Volunteering

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# Contents

	<b>Reviews</b>	<b>9</b>
	<b>Preface</b>	<b>10</b>
<b>1</b>	<b>So You Want to Volunteer</b>	<b>14</b>
1.1	Self-Assessment: Just Why Are You Here?	14
1.2	Drivers and Motivation	14
1.3	Values	19
1.4	Interests and Skills	20
1.5	Making an Initial Plan	22
1.6	Purpose	23
<b>2</b>	<b>Finding Place</b>	<b>24</b>
2.1	Risk-Takers	25
2.2	The Risk-Averse	30
2.3	Who Are You, Volunteer? Who Do You Manage, Manager?	32



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<b>3</b>	<b>Retaining Volunteers</b>	<b>34</b>
3.1	And, a Special Note for You Managers	35
3.2	Part I: Knowing Where—and Who—you Are	36
3.3	Understanding Who and Where You Are—“KY... Analysis”	37
3.4	Part II: Building the (Cultural) Foundation	41
3.5	Summary	46
<b>4</b>	<b>Working with Teams</b>	<b>48</b>
4.1	Building Great Teams	50
4.2	How to Build a Great Team:	50
4.3	Team Failure vs. Team Success	51
4.4	The New Paradigm	52
4.5	Maintaining Healthy Teams	54
4.6	Why Do We Do These Things?	55
4.7	In Summary: The Little Team that Could	55

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<b>5</b>	<b>Planning for Success</b>	<b>56</b>
5.1	Writing Briefs	56
5.2	Scheduling	60
5.3	Paying Attention to the Big and Small	62
5.4	Choosing to Lead and Manage	62
5.5	Leading Balanced Lives (Personal Planning)	62
<b>6</b>	<b>Getting and Staying Organized</b>	<b>64</b>
6.1	Managing Yourself	65
6.2	Managing Your Teammates	70
6.3	Supporting Your Managers and Managing Up	72
6.4	Delivering Good Products and/or Service	73
6.5	Summary	75

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<b>7</b>	<b>What about the Money?</b>	<b>76</b>
7.1	Asking for Money, Making Money	78
7.2	Events and Sales	79
7.3	Philanthropy	82
7.4	Foundation and Government Grants	83
7.5	Finding a Sponsor Match	86
7.6	Summary	87
<b>8</b>	<b>The Encore Volunteer</b>	<b>89</b>
8.1	Transition	90
8.2	Attitude	93
8.3	It's All about Your Leadership, Encores	95
8.4	Summary	98

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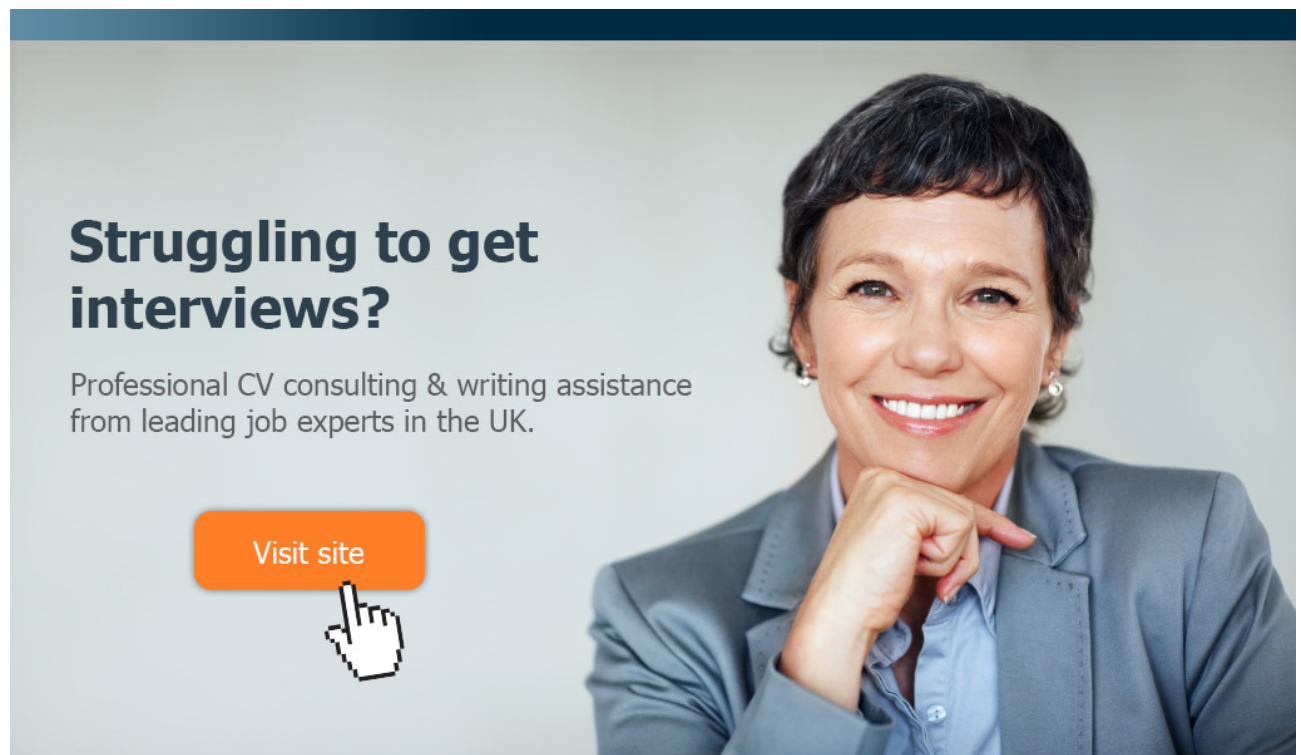


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<b>9</b>	<b>The Sustainable Organization</b>	<b>99</b>
9.1	Motivation, Maintenance, and Sustainability	99
9.2	Motivation in Practice	101
9.3	The “First Ten”	103
9.4	In Summary—Practice Management to Attain Sustainability	111
<b>10</b>	<b>Celebration</b>	<b>112</b>
10.1	Celebration as Management	113
10.2	Celebration as Recognition	114
10.3	Closure	118
	<b>Epilogue</b>	<b>120</b>
	<b>Authors</b>	<b>123</b>
	<b>Acknowledgements</b>	<b>125</b>
	<b>References</b>	<b>127</b>



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# Reviews

“This is an outstanding resource that will make your volunteer experience productive and purposeful! *VOLUNTEERING is* an excellent handbook providing insights and tools to those looking to volunteer, and for those who have taken on the rewarding task of leading and managing volunteers. Individuals meet many of their own needs through volunteering to help meet the needs of others. Take the time to allow these authors to motivate and guide your preparation for an experience of volunteering that will be rewarding to you and to those you serve.”

**Michael E. Collette Ed.D. | Professor of Management and Past Vice President of Operations | Anderson University, Anderson, Indiana, USA | Past President of the Madison County United Way, Indiana, USA**

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“The authors provide a concise and accessible primer on the strategic management of the critical human resources that make non-profits work—volunteers. The engaging book frames the volunteer experience as an opportunity to value add to not only the organization, but the skills and knowledge of the volunteers themselves. In short, Burgher and Snyder combine Leadership 101 with the everyday realities of management in mission-driven environments with limited resources.”

**Jay D. Gatrell, Ph.D. | AVP for Institutional Effectiveness Research, and Graduate Initiatives  
Professor of Geography | Bellarmine University, Louisville, Kentucky, USA**

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“In searching for volunteer training resources, very few books can capture the essence of volunteer theory and practice as effectively as Burgher and Snyder’s *Volunteering*. The authors have developed a volunteerism manual that can be used by both new and seasoned volunteers in any field. In less than 100 pages of text, all major concepts are adequately explained through the detailed illustration of numerous practical applications. The book is written in a simple, non-academic language that makes it pleasant to read, to understand and to apply to various volunteer assignments. Every volunteer coordinator and/or volunteerism enthusiast should delve into its pages to discover the fascinating world of volunteering! I wholeheartedly recommend this work to all my students, colleagues and fellow volunteers in the field.”

**Athanassios (Ethan) Strigas, Ph.D. | Graduate Program Coordinator in Sport Management | Associate Professor of Recreation Management | Contributor: “Sport Volunteerism in the Middle East,” 2012, Ben Sulayem, S. O’Connor and D. Hassan (Editors), Routledge, London | Indiana State University, Terre Haute, Indiana, USA**



We hope that this text has just been “issued” to you as a first assignment at your new organization. First, you might ask yourself, why are you here? We will speak to this many times throughout this book. It is very important for you to know (at least mostly) why you have decided to volunteer. You need to find your niche in the organization, to find a group of people that you can relate to—to dig that “volunteer” ditch with, and have some good times. This book is meant to help you enjoy it all. The work is obviously quite important. However, great work will result if we pay attention to ourselves and our people first. If you are a manager, you need to ask yourself why you have chosen to manage people as a volunteer or as paid labor. There are numerous other ways to make a living that would prove far less difficult. Management is hard; managing a group of unpaid volunteers is harder.

Volunteering can be so satisfying, can provide a significant learning experience, and can stave off loneliness. It provides a place for the recently retired to find a new group of friends and acquaintances (see chapter 8, “Encore Volunteering”). It can enhance careers, giving experience to those who may not be able to get it elsewhere. Volunteering provides us with a purpose and a release for our innate need to help others. We contend that purpose and service has always been and always will be the primary driver for humanity.

Volunteering also serves to reduce anxiety. It seems we now live in an “age of anxiety.” We often think—excessively. We worry about the future, fret over the past, and miss the present. Volunteering, being altruistic helps us help ourselves and others in the present. For the reader without a volunteer place or a purpose yet, we suggest you read this book cover to cover, find a place that speaks to you, give up some of your time and reduce your stress levels. Being in groups, being accepted by others, and having a bit of a purpose helps us think more clearly and can even help us save money on doctor’s visits and medications. Service to others has medicinal value—purpose and acceptance are just plain good for one’s health.

Given that so many of us do not get to choose very specifically how we earn income and put food on the table or shelter over our heads, a good cause can give us relief. The paid economy can be vicious. The unpaid economy can provide us with many positive choices and experiences, and a world of opportunity. We can feel empowered as we determine how we will volunteer and give of ourselves and donate our labor. We suggest that instead of medication, or only medication, you grab a handful or two of cashews (which are a calming snack) and drop by the local food shelter to move some boxes. We can follow our hearts to a place of needful work, acceptance, better health, and goodwill.

As we will discuss in the following text, sometimes we can learn post-event that volunteering fulfills purposes unknown to us. An interesting example of this can be found in motor sports volunteering in Abu Dubai. There, the volunteer advisors learned that due to the cultural norms and characteristics of this society, the motor sports volunteering provided for a very specific avenue for young people of both genders to mingle, work together, and develop personal relationships in a safe and acceptable environment.

In addition, as well as engaging in a wide variety of cultural specifics, volunteers must often comprehend and mix with very different generations of people. For example, the “millennials” (born ~1982–2002) and the “new lost” (currently ~16–24 year olds who were impacted by the 2008 + poor economy), require a definable sense of purpose in real time. High contact with one another and measurable contributions for a greater good are essential for this group. Hope for tomorrow has been displaced by the now purposeful—and to our dismay, often hedonic—present.

Consequently, expectations of these generations have become hugely significant in the work place. Perhaps this is why so many people have become so anxious, and why paid work is just not getting it done for these people, as recognizable in the fact that this generation changes jobs so quickly. If we choose our volunteering activities carefully, if we examine ourselves pointedly, perhaps we can provide ourselves with some deserved relief. This book explores these and other topics while also serving as a roadmap for how to get the most out of your volunteer experiences by understanding the volunteer and the volunteer organization. This text is also a guide for you personally, to help you have a successful experience.

On the organizational front the book takes some time to explain the volunteer organizations and bureaucracies. We must understand that, large and small, volunteer organizations have all of the same problems that profit-oriented and government organizations have.

Each year many billions of dollars in monetary contributions and labor value are donated to a wide variety of efforts, from sandbagging rivers to huge international sporting events. Unpaid labor (volunteering), as it turns out, can often behave organizationally like very big business. For example, thousands and thousands of people volunteer around the world for major sporting events such as the Olympics and International Grand Prix events. These events are very expensive to operate and as a volunteer we must understand that we have sometimes engaged with “huge-business-like” ventures that behave very much like large government agencies or Fortune 500 companies. Patience is important with all volunteering activities, and can be especially important as you join up with very large and complex activities and events.

We will more specifically begin in chapter one by examining your drivers and providing you with assessment tools to make your experience more enjoyable and give you reason to stay. In chapter two, we will walk you through finding your place within an organization—are you a risk-taker or are you risk-averse, and how will this affect your role as a volunteer? Next, in chapter three we will discuss retention of volunteers, which relies heavily on excellent interpersonal skills. You must know who you are, who your fellow volunteers are, and “where” your organization is. This section will focus on “KY... Analysis.” On a related note, you must know how to work effectively as teams, which is the subject of chapter four. Volunteers can accomplish great things together, especially when they know how to make use of individual members’ strengths.

In chapter five, we move into some of the nitty-gritty details of planning, including preparation of briefs, paying attention to details, and leading balanced lives. Chapter six further develops strategy by delving into methods of getting and staying emotionally organized. This will be particularly helpful for managers within your organization, but also for individual volunteers. In chapter seven, we will discuss a topic that cannot be overlooked: money. What do you need to know about fundraising? How can it impact your organization?

Chapter eight is meant for the “encore volunteer,” the person who has already retired and is looking for a way to contribute to society. We will offer you some suggestions for transitioning to this new realm and consider how your previous experience can lead to you mentoring others while generating great personal fulfillment. Finally, we close in chapter nine and ten with two very important aspects of volunteering: sustaining and celebrating the people and the group you work with. How can you keep your organization going? And why is celebration crucial to your organization’s sustainability? We believe no work is really good work unless we build it to last, or undertake it with the intention of completion.

This book is not complex. It is meant to very simply serve as an introduction to your new or different experience and to help you, your manager, and your organization—and of course, the work and cause—be widely more purposeful, organized and successful.

In summary, volunteering provides us with many avenues of enjoyment and sources of pleasure. We hope you will read this text in its entirety so that you better understand “why” while finding your fit within a group. You can then make better contributions to your causes and to each other, which can help you lead a calmer, more productive, and less anxious life.

Now that you have read this far we expect you to finish it up and become a more purposeful and productive volunteer. We want you to “act” purposefully rather than “re-act” passively. We all have just one journey in this life, so let’s all make the best of it.

Thank you for volunteering. The world is a better place because of you.

Karl & Mike



# 1 So You Want to Volunteer

Welcome to the team! We are happy you have decided that volunteering is for you. It is now time for you, volunteer, to determine a few personal objectives and to *find your place* in the organization. This chapter will help you assess yourself, examine your reasons and purpose for volunteering, and identify your values, interests, and skills. It will also help you lay the groundwork for making a plan. Using the assessment tools in this chapter will help you clarify your objectives and set you down the path toward making healthy and satisfactory volunteer decisions.

**Action Step:** *We suggest that you read this book actively. Grab a pad of paper and pen and jot down notes as you pass through this book. Making notes in real time will help you synthesize your thoughts and develop your plan of action.*

## 1.1 Self-Assessment: Just Why Are You Here?

We want you to think about why you have decided to volunteer. There are many drivers and motivators that you may bring with you to the organization or task. We will chat about a few of these in this chapter. But first, let us begin at the beginning, and ask some broader questions. We want you to know and understand why you are doing what you do and who you are, in hopes that this knowledge helps you find an appropriate organization and role. We argue that this does not involve magic. Often we must just begin and do and learn along the way. However, you should make sure you have come to the right place to volunteer and that you examine the right things in the right order. You must then decide to take the first step and go to work.

**Table 1: Chapter Overview**

- Self-Assessment
- Drivers and Motivation
- Values
- Interests and Skills
- Making an Initial Plan
- Purpose

So let us start our journey and step through a few initial items to begin the process.

## 1.2 Drivers and Motivation

What motivates volunteers to volunteer?

How do organizations encourage people to volunteer?

These are questions researchers have been working to understand for decades. Obviously much progress has been made as there are many people who have obtained their PhDs with such study.

As discussed in the preface we see that the primary driver for volunteering is self-serving in that we all require a purpose and a notion that we are making a contribution to humanity in some way. We have benevolent reasons why we are doing or taking action right now to improve either the present or the future.

**Table 2—Volunteering Self-Assessment**

*Determine your motivations for volunteering.*

*Determine your interests and skills and/or the skills you want to develop.*

*Choose an organization that aligns with your values.*

*Make a brief plan for your participation over time.*

*And, just begin; You will learn more along the way.*

The people of Apalachicola, Florida are a prime example of doing both at once. The Apalachicola River carries with it the fresh water needed to mix with the sea to create an environment conducive to oyster harvest (current needs) and for the balance of the ecosystem from the smallest of organisms to those species at the higher end of the food chain. The bay, the boundary, and the sea all come together in balance. People upstream want the water, too, and are holding much of it back as drought ensnares the region.

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Folks strive to make a living, feed and educate their children (upstream and downstream) and save one of the last undisturbed river systems and bays in the United States. The Apalachicola River Keepers organization relies on numerous volunteers and donations. Some contributions are purely financial. Other people visit from faraway places to participate in volunteer efforts and to see for themselves that this ecosystem is healthy. There are many drivers; there are many motivators. It is complex, and the messaging to articulate the purpose is complex. The balancing of economics and preservation are tugging at each other always. The folks upstream want the water for survival and economic interest in the present and future as do all others down river to the bay. This volunteer group has been advocating and managing their case for decades and will likely for decades to come.

So let's get back to the issue at hand. What drives us to show up, drives us to excel, and drives us to keep coming back to organizations such as the above? And, most importantly, for you, why do *you* want to volunteer?

Researchers have been studying this subject for a long time, including Clary et al. (1998), Katz (1960), Smith (1956), and many others., We include discussion of it here so that you can ask yourself which of these reasons drives you and which of these do not drive you.

- Volunteers, have you thought out carefully why you are showing up to volunteer? We suggest after reading through this information that you make your own list. This section is to help you help yourself with respect to motivation.
- Volunteer managers, this section can help you make better decisions about volunteer roles, the management of those people and roles, and how to best sustain a volunteer's interests.

Clary et al. (1998) and others via this influential paper have settled on six general areas of volunteer motivation. These papers, if you desire further reading, are academic qualitative reviews, and/or experimental and data-driven exercises. We describe these areas in lay terms, so that you, the volunteer, and you, the volunteer manager, can apply the principles immediately to your organization. We are neither researchers on motivation nor experts on the content. But we are professional managers engaged with the execution of projects, processes, and tasks with experience in many types of organizations. We are experts at keeping individuals moving forward, teams moving forward, and organizations (of any kind) moving forward, guided by a set of requirements to—and this is key—complete the work. The list below is not necessarily complete, as there are many things that motivate different people at different times. It will give you an idea, though, of things to consider about your own motivation.

#### Project Management

*There is not a whole lot of discussion in the literature on how to improve the volunteer organization and service sector with basic project management tool sets. Nor is there much mention of aligning the management of volunteers with the concepts of management of service workers and knowledge workers. We suspect that volunteers are much like knowledge workers even when they are performing tasks that do not necessarily require a whole lot of knowledge. We think this is all quite important and requires much greater introspection than it has received and we look at this in depth later on in our text. Right now we will focus on motivational concepts specified by a number of scholars on volunteering. Keep in mind though that this book is not an academic exercise. It is meant to help you become a better volunteer or a better manager of volunteers and thus foster a healthy and sustainable organization.*

Here is what Clary et al. call the six “functions” of volunteer motivation. Subsequent research follows much of the same notion. We believe his work can get you started without the need to belabor and review decades of research. This is not an academic nor research text. It is meant to teach practically and to encourage some initial thought. As stated initially, you simply need to begin somewhere with some thought and a bit of a plan and the rest will come along the way. We attempt to wrap some application and explanation around each of these tenets along with several action suggestions:

1. **Values**—Pick an organization that shares your values. Study your values. You need to know your ethics before you need your ethics. Examine who you are and take stock of your moral, ethical, spiritual, and human characteristics. If you are not a good fit, everyone will be miserable and you will quit. Managers, watch for this in your people.
2. **Understanding**—Find an organization that can use your skills or teach you what skills you want to learn. Share your abilities and learn new abilities. Young people, go find a place that will teach you something. Managers, make sure each of your volunteers has ample opportunity to grow and learn.

3. **Social**– Find people you want to hang out with. Do not choose an organization or perform an activity because of unwanted peer pressure. This will only make you miserable and waste resources. Managers, constantly develop your team. This happens on a daily basis, not with once-a-year chats or retreats.
4. **Career**—For those of you that are “work inexperienced,” consider picking an organization that can land you a job or enhance your career. If you are retired, do what you want to do, not necessarily what you are good at (your previous career). Volunteering needs to be enjoyable and constructive. Managers, put round pegs in round holes, meaning do not try to turn a duck into a platypus.
5. **Protective**—It appears, according to others’ respected research that many folks volunteer to reduce the guilt associated with success, to get rid of a feeling of inadequacy or insecurity, or to escape. These are all very bad ideas. Turn the protective motivator into learning, healing, and giving because it makes you feel good, not because being successful or rich or strong makes you feel guilty. Lose the guilt; you will be a better volunteer without it. This goes for you too, managers.
6. **Enhancement**—Clary et al. attribute this motivator to a need to “obtain satisfactions related to personal growth and self-esteem.” Let us call this “purpose.” We all want to have purpose, we want to be able to define ourselves in a positive manner, and feel like we are helping someone, somewhere, including ourselves. We need to choose an organization and/or activity that help us feel like we are making a contribution. Managers, make sure all of your volunteers know that they are appreciated and are undertaking tasks with purpose.

<b>Table 3: The Six Functions</b>
<b>Values</b>
<b>Understanding</b>
<b>Social</b>
<b>Career</b>
<b>Protective</b>
<b>Enhancement</b>

All six of these are all great motivational and managerial requirements. They are functional, meaning that you can have one of them or all of them driving you. It just depends on you. We suggest you keep your objectives simple, though. Know why you are doing what you are doing, but don’t analyze to death your motivations. The rest will flow and as you engage you will learn.

Managers, you must pay attention to all six of the above motivations with all people you manage and understand which of them drive or impact which people. In chapter 2 we will speak in greater depth about properly placing people into various roles.

In finishing this section, we would like to add a couple of additional drivers, suggested by Strigas (2010) in his sports volunteerism research, and that is the concepts of match-making and social interaction. As we mentioned in the preface, there are many places throughout the world that have much stricter cultural norms associated with the mixing between the sexes and the acceptance of mixing with other cultures than what we find in the West. It appears volunteering often can serve a match-making and societal blending function in many locations. If this is true in your part of the world, manage it, and see that the mixing occurs in a healthy, culturally acceptable way.



Volunteering can also serve as an introductory process of mixing young teens in a chaperoned manner, at times leading to some initial match-making and courtship practices. We may find we can provide a safe place for young people to learn how to behave and mix sexes in a healthy and mature venue. Who would have thought? We find it all quite interesting.

### 1.3 Values

You already have a set of values that determine who you are, what you believe, and how you act and react. Can you articulate those values? Doing so can lead you to better self-awareness and a greater understanding of your place within a volunteer organization. We suggest that you begin your values self-assessment by doing a Wikipedia search for “Values in Action Inventory of Strengths.” This is a bit of a misnomer in that the **Values in Action Inventory of Strengths (VIA-IS)** is a more detailed “psychological assessment measure designed to identify an individual’s profile of character strengths” (“Values in Action Inventory of Strengths,” n.d.).

**Assess your values with the “Values in Action Inventory of Strengths (VIA-IS)”**

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Higher education career services web sites can be good tools for self-assessment, too. Most major universities have a robust career center and have no reason to hide what they do behind a credentialed wall. Typically they will have surveys that ask you why you are interested in what you do today and what you may want to do in the future. We suggest you start with a career center survey and the **Kiersey Temperament Sorter (KTS-II)**. These are both free. The **Myers-Briggs Type Indicator (3)** is a classic, and, as such, needs to be mentioned, but has a fee associated with it. It can be found at The Myers & Briggs Foundation and the Center for Applications of Psychological Type. We list other similar options below, along with several other university values inventory tests. There is no need for us to repeat all of the information you will find about these topics on the Internet. Invest some time in exploring on your own. We simply want to get you started thinking about your values and your needs at the inception of your volunteering service.

After you have consulted some of these sites and completed some self-assessments, think about your values, what makes you tick, and what kind of organization you want to volunteer in. The above links may get stale over time, but by simply searching the web and/or Wikipedia for “values surveys” or “self assessments” you will find more than enough information to get you thinking a bit more about where you might fit best.

<b>Table 4—Assessing Yourself and Potential Volunteer Activities</b>
<b>Career Planning at the University of Minnesota</b>
<b>Kiersey Temperament Sorter</b>
<b>Myers-Briggs</b>
<b>Myers-Briggs Look-A-Likes</b>
<b>Notre Dame—Work Values Inventory</b>
<b>Notre Dame—Prioritizing Your Values</b>

### 1.4 Interests and Skills

Skills are the talents we have, and interests are the talents we may have and want to utilize or talents we may not have, but definitely want to have. We often want to learn new things, engage with new activities and simply change it up so we can have different experiences outside of our current day job or during our retirement or post work-for-pay years. Another very important volunteerism driver for young adults is the ability to acquire career experience. We will go down that path later in this chapter, but for now remember that we do not always come to the table with what we need to know. That is OK. It is fine to come to an organization with what we want to know and learn.

Organizations may often ask you to take a volunteer application interest survey to make sure that you are indeed a good fit with the particular organization and they may have a set of volunteer guidelines. Read these. You can find a nice example of such at the website of Immacolata, a home for disabled adults and children in Missouri, USA:

<b>See Immacolata Manor New Volunteer Interest Survey</b>
<b>And, an extra—The Volunteer Guidelines for Thrift Shop Volunteering</b>

With respect to skills, most adults know what their strengths are at some level. We do not necessarily know, however, what we might be good at given the opportunity to try something new. Current skills are probably the ones we want to bring to the table to begin our volunteer service. These current skills are usually what we are best at and what will allow us to get established in the volunteer organization. Note that not all volunteer activities require any significant skill level at all except for a strong back—the work may be as simple as moving sandbags during a flood. This is okay, too—we may just join to associate, not necessarily to “skill up” and/or provide knowledge work. Many organizations, however, will want you to show that you are good at something and have been responsible in some fashion at some other location before even bringing you on to perform unskilled tasks. So in either case, it is good to know what you know. That said, we do not always know what we know, and that is why we might take a talents or skills assessment test or survey.

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Below you will find several examples of these. The first is a general survey on skills, the next is an employability assessment, the third covers work ethic, and the fourth is a technical skills assessment for online learning (included as a means to assess your ability to use computers, especially for those of you in the encore crowd). At a minimum, surveys like these can set some knowledge levels and expectations. Volunteers, you should look at these and others and assess your skills. Volunteer managers, you might consider creating these kinds of documents to better fit folks into the organization's roles prior to full integration. These are all meant to simply be examples. Get the "Google" going and find your own survey or process. If you have already volunteered and chosen an organization, these might help you find your place inside of that organization.

<b><i>Experience Matters—Connecting Talent with Community</i></b>
<b><i>Talent Application at Experience Matters</i></b>
<b><i>The Work Ethic / Employability Survey Site @ the University of Georgia</i></b>
<b><i>Technology Skills Assessment</i></b>

## 1.5 Making an Initial Plan

We all need to begin somewhere. A plan can be as complex as a proposal or as simple as jotting a few notes down on a scrap of paper. As of late we have been taking to writing down in a notebook or binder all of the projects we are chasing and the work we have embarked on. Under each activity we make a few notes, most specifically, what to do next. We suggest you keep your plan simple to start, and know that as you learn, and add more data, it is OK and in fact it is necessary to change that plan. In each case we must know what the next step is with some detail, the step after that with a little less detail and so on. In Chapter 5 we go into some depth on writing a work plan brief. The following graphic provides the steps necessary for your successful volunteer outcome.

**Table 5—Planning Steps**

1. *Introduction (the "What do we want to do?")*
2. *Purpose (the "Why do we want to do it?")*
3. *Action Steps (the "How are we going to begin?")*
4. *Schedule (the "When will we start, when will we meet milestones?")*
5. *Budget (the "How Much might this cost us in dollars? In time?")*
6. *Stakeholders and Leaders (the "Who Cares about our work?" and "Who Is In Charge" of our work along with us? Who might our manager be?")*
7. *Outcome Assessment (the "When Are We Done?" and "How Well Did We Do?" Who will assess it?")*
8. *See the Following Website for Plan Examples: [indstate.edu/strategicplan](http://indstate.edu/strategicplan)*

## 1.6 Purpose

We want to drive this motivator home. Purpose is related to so many things, including your ego, your likes, and your desires. We want to single out purpose a bit more for you, the volunteer, or you, the volunteer manager, because many times we all need a deeper purpose other than some material delivery. Now, we do not mean a purpose to compensate for other losses, as this may not be sustaining unless incorporated with some healing, but rather a purpose to contribute to the greater good, to have a deeper reason to get out of bed in the morning.

We are altruistic creatures. We seek to make meaning of our lives and we are faithful creatures (whatever that faith may be for each of you). And at the end of the day, to be a successful volunteer, and to manage a successful suite of volunteers, we all need to pay attention to our own purpose and the purpose of others. You must make sure you know why you and others are present, so that as individuals you can find and hold onto that purpose and driver, thus leading to a satisfactory experience.

As managers of volunteers you must make sure your people are fulfilled in some fashion or another, most of the time, so that you can get the necessary work accomplished completely and satisfactorily. We all must acknowledge this in ourselves and others (especially you, managers) While this text is about volunteering, it is also, and primarily, about how to successfully accomplish work with volunteer labor. It can't come together unless meaningful and complete execution occurs and unless volunteers come back to the organization another day and continue to give up their time, undertake some meaningful work and complete objectives—on-time, on-budget, and at a specified level of sustainable quality.

**Table 6—Key Points to Remember from this Chapter**

- *Assess why you have decided to volunteer.*
- *Determine your motivations.*
- *Consider the six general areas of volunteer motivation proposed by Clary et al.:*
  - *Values*
  - *Understanding*
  - *Social*
  - *Career*
  - *Protective*
  - *Enhancement and definitional*
- *Volunteering can be an arena for match-making and social interaction.*
- *Determine your values.*
- *Define your interests and skills.*
- *Make a plan.*
- *Understand your purpose.*



## 2 Finding Place


*Finding (a quiet) place and comfort in the 21st century hurry-up, add-on organization is like stapling Jell-O to the wall—tricky at best.*

How can you make sure you have a positive experience within your volunteer organization? One way to do this is to make sure that you find the right place within it. You need to ask yourself some basic questions to assess what role(s) you can best fulfill and what kinds of tasks you are most able to perform. For example, are you a risk-taker or are you risk averse? Do you need precise instructions to complete your tasks or are you able to forge a path for others to follow? How do you react when things do not go as planned? This chapter will help you determine what kind of role you might be able play and what position to take in your chosen volunteer organization.

**The bottom line is that successful organizations execute and deliver completed tasks on time and on budget.**

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Your fellow volunteers also need to know where they stand. They just might need help finding their places. Managers, pay attention! Not everyone can be all things, and organizing your group of volunteers and assigning tasks to them according to their abilities and personality traits can help you succeed more efficiently, with better results, as individuals and as a team. You need to assess yourself and your volunteers. You also need to assess the tasks your team needs to complete. You will need to put the round pegs in the round holes, assigning tasks to your people in a fashion that mixes their personalities and skill sets so that they may all overachieve, make a contribution, and realize their purpose.

The bottom line is that succeeding in your organization's tasks comes in their *execution*. We think, we plan, and then we execute. In this chapter, we will look at how you can best integrate both your risk-takers and your risk-averse volunteers into your group and the work at hand.

## 2.1 Risk-Takers

Let us begin by talking about risk-takers. You know the type: the person who makes a group commitment for a work effort and deliverable without checking in; buys the item you have long needed on credit; or accepts the challenge to do just about anything anywhere without fear and without worry and often without a whole lot of thought. These are the individuals who often follow the more visible and externally issue-laden challenges. This does not mean that the work they do for your organization is more difficult. It is just different than the work of those who manage operations day in and day out. We would argue, though, that the risk-takers are the volunteers who do find themselves in charge at the end of the day. They become the most visible and get the most recognition, often have broader experiences, and if they succeed in the challenges they take on they often get the volunteer promotion and even more responsibility and thus risk-taking freedom. This can be good and this can be risky.

Risk-takers do all fail at some point, and that is part of the excitement to them in being in their position. Their personalities allow them to understand how to get up and move ahead after failures. This may be the primary difference between the risk-takers and the risk-averse. The pain associated with the loss is so much greater than the gain from the win that many folks prefer the safer path.

The following types of individuals might be considered more risk-aggressive than others:

**Table 7—Chapter Overview: Types of Volunteers**

**Risk-Takers:**

- *The Entrepreneur*
- *The Builder*
- *The Doctor*
- *The Closer—Type 1*
- *The Closer—Type 2*
- *The Pure (Project) Manager*

**The Risk-Averse:**

- *The Maintenance Volunteer*
- *The Designer, Planner, and Scheduler*

### 2.1.1 The Entrepreneur

In our minds there are very few true entrepreneurs. Vincent Van Gogh and Jane Austen were entrepreneurs. Einstein and Gödel filled the bill, along with Marie Curie. And of course, Steve Jobs surely was. Kiran Mazumdar-Shaw is an entrepreneur, even if not yet universally known for her pioneering work in biotech and health care in India. Bill Gates has some entrepreneurial tendencies, but mostly, he is an excellent businessman. And we can't resist, Edison was not really an entrepreneur, as he relied so much on trial and error and business savvy; Tesla was the trailblazer and, in our humble opinion, never quite got the full recognition he deserved.

An entrepreneur often starts in a vacuum, typically seeing the world as a problem, and begins the process of solving that problem. Jobs built products and then let people adapt. For example, he began producing USB 2.0 chargeable devices when approximately 70 percent of the world still had USB 1.0 ports in their computers. In contrast, Gates's empire builds products where there is already a commodity demand. His expertise is that he routinely corners the market, which makes for great business.

#### **The Entrepreneur**

- *often starts in a vacuum.*
- *sees the world as a problem to solve.*
- *may not seem like a team player.*
- *has many ideas that may seem impractical.*
- *may be an idealist.*
- *may "see" but needs organizational help.*

In our organizations, the entrepreneur might not seem like a team player: she is always full of ideas that at first seem impractical. Perhaps she is an idealist, or maybe she is not very happy and spends time trying to solve problems for which no one has time or to which no one pays attention (if only because they are too busy putting out fires). We suggest that if you have a true entrepreneur in your group, present the current problem and ask her to prepare a plan to fix it—and then get out of the way.

Some entrepreneurs simply "see" the solution and will need help from others to plan and implement it. If the entrepreneur in your office turns out to be somewhat organized, then you may have found a resource who will continue to identify solutions for you in multiple areas. Some would say we do not have the resources to daydream, but really do we have the resources not to improve and move forward? Do we have resources to waste on undertaking processes and projects that are broken? Experiment a little bit: ask your entrepreneurial volunteer to draw up several solutions. Give her the opportunity to present her ideas to your group. Sometimes, an entrepreneur's vision will need to be translated into definable tasks that everyone can understand.

Entrepreneurs can be difficult to work with at times, as they are often idealistic, and can get cranky when no one listens to their solutions. However, they can also be a joy, and have much to offer your organization. Are you an entrepreneur? Managers, do you have one in your shop? If so, select assignments appropriately.

### 2.1.2 The Builder

Builders may be confused with entrepreneurs. Although they may have many of the same qualities, they are not the same. Entrepreneurs start in a vacuum and often do not care about costs or practicality. Builders do. Builders know that an action must add value. Builders can take a plan or idea and turn it into action and a definable set of deliverables. They can see the end and envision the objective. They can see the path that is necessary to progress from zero action to charting a course to a working service or product.

Builders can help your group jumpstart your tasks, organize events, and plan for the future. They have the ability to adapt and change course at a moment's notice. They can motivate others and show them the path to completion. Find someone in your group who builds things at home—ships in a bottle, racecars, or landscapes—and who enjoys charting unknown paths. The builder is a change agent who must like people, have considerable energy, and understand that “no” means “different” and not necessarily “no.” Builders know how to move work forward. When faced with a difficult decision point or roadblock, they either pitch another alternative solution or, at times, plow right on through.

#### **The Builder**

- *cares about costs and practicality.*
- *knows that an action must add value.*
- *take plans and ideas and turn them into actions.*
- *envision objectives.*
- *charts a course to a working service or product.*

“I studied English for 16 years but...  
...I finally learned to speak it in just six lessons”  
Jane, Chinese architect

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### 2.1.3 The Doctor

“Doctors” come into an organization—often from the outside—and get a project, a group, or even an entire facility back on track again. Simply stated, they are fixers. Perhaps you have a retired executive or two that can get the group back on track? Doctors typically work with mature and troubled organizations or projects. And while they need to be somewhat visionary, it is even more important that they be able to repair and resurrect. These individuals like puzzles, they enjoy helping folks get out of trouble, and they like to facilitate others’ success and get folks and teams organized.

#### **The Doctor**

- *can get a project back on track.*
- *is a fixer.*
- *can repair and resurrect.*
- *enjoys helping folks get out of trouble.*
- *likes facilitating others’ success.*

Doctor volunteers sometimes have to move things backwards before they can move them forward again. Often, they also must regain folks’ trust before they can begin to take action. This can prove rewarding. In our experience, people really do want to do well, be validated, and have purpose; they simply do not always know how to begin and/or get to where they need to be.

Your organization’s tasks become unglued for a variety of reasons. Doctors can make a significant difference, especially when everyone knows that the new plan is for long-term success. You may have a doctor in your organization already. We rarely want the diagnoses doctors make, but doctors are valuable. We all need them, whether for routine, chronic, or urgent care. Volunteers, do you like to get the disorganized organized? If you are the doctor, find your place.

### 2.1.4 The Closer—Type 1

Killing or shutting down tasks is hard to do. As humans, we do not like to kill things; but at times, we must. We must kill the project that turned into an unsalvageable disaster. Death is a part of life, and sometimes, your organization will need to let some tasks die. Shutting them down in a tactful and delicate manner is an art form. Ending some tasks may result in minor consequences for your group or for the people you serve; ending other tasks may result in major consequences for them.

#### **The Closer—Type 1**

- *knows when to shut down a project.*
- *can tactfully shut down a project.*
- *helps others transition into new roles.*
- *extracts useful things from the dead project.*
- *shifts resources to a new front.*

Closers shut things down delicately, inducing a minimum of heartache for all of those involved. They help others transition into new roles and new tasks. They extract everything that is useful from the dead project and then shift those resources to a new front. Volunteers, does this describe you? If so, let your manager know. Managers, watch for the closers; they can often soften the very difficult decisions we have to make.



### 2.1.5 The Closer—Type 2

The type 2 closer—who also may be called the “finisher”—has a special talent as well. On smaller tasks, this role often falls to the same person who started the job. Everyone must ultimately take a task or whole project from start to finish. However, many can have trouble finishing, as this means being judged. And sometimes for all, and sometimes for some, this is difficult, so people never seem to bring their projects to completion.

A good type 2 finisher pays extreme attention to detail but is balanced in their understanding: they know that a “B+” is a fine grade and adopts the attitude that once a task is operational, time can be spent “moving it on up” to an “A.” A hundred things may need to be examined before the task is finished. This closer, really a finisher, pays extreme attention to detail, knows how and when to “go live,” and does not fear the first day of operation. They thrive in it.

#### **The Closer—Type 2**

- *is a finisher.*
- *pays extreme attention to detail.*
- *has a balanced understanding of all things.*
- *knows how and when to go live.*
- *does not fear the first day of operation.*

Are you a very detailed-organized volunteer? Managers, who in your shop knows how to close and does not fear the “go-live” moment?

### 2.1.6 The Pure (Project) Manager

Pure (project) managers might also be called mercenaries, although that term does not sit well with many. Without a passion for the cause—or the deliverable—they instead, if they are good, have immense passion for the people. The pure manager sometimes is maligned, but the truth is that the world is full of dedicated and compassionate mercenaries. These are managers who can oversee any job, anywhere, across cultural lines and geographic boundaries. These are often the most seasoned and confident leaders.

#### **The Pure (Project) Manager**

- *has immense passion for the people.*
- *can oversee any job, anywhere.*
- *is often a seasoned, confident leader.*
- *surrounds themselves with content experts.*
- *understands processes and systems.*
- *has a passion for helping others succeed.*

They surround themselves with content experts, have an extreme ability to understand processes and systems (a highly transferable skill), and have a passion for helping others succeed. They may not share others’ passion for the product or service, but they acknowledge that passion in others. Their joy and purpose are in seeing others succeed. As a result, pure managers often have extensive experience, having moved from unit to unit to help build and rebuild others’ areas. Their mantra is “any project, anywhere, anytime.”

Many of these people thrive on risk. They can add value in almost any organization. Managers, watch carefully for the most seasoned of managers—while at first glance they may appear a bit neurotic, they may in fact be full of skill and expertise. Volunteers and volunteer managers, please pay attention and find this expertise in your organization. Volunteers, if you are a benevolent mercenary, you will find that you always have a place in an organization.

## 2.2 The Risk-Averse

Say what you may about the risk averse, but they are steady and they are indispensable. Without their contributions, risk-takers would have nothing to do. The risk-averse will keep knocking on doors until their tasks are complete. They can move mountains with their persistence and they can provide the foundation for your organization.

The risk-averse do not necessarily like to get beat up, yet they do work harder and perhaps have to dig a little deeper to maintain the stamina needed to complete your organization's tasks and to volunteer in, or manage the daily operations. Attention to the "same detail" over and over is a key to their success.

They always show up to help and the best stay longer than other volunteers. They are consistent, patient, often very caring of others, and unbending. They just never give up. We need them, and we need to give them far more respect than the world often does. You need to take care of these people inside of your organization, for they are one of your most valuable assets. Acknowledge the flash of the entrepreneur and risk-taker, but always make sure the steady risk-averse get a fruit basket for the holidays.

The following types of volunteers might be considered more risk-averse than others. Do you find yourself here?

### 2.2.1 The Maintenance Volunteer

These volunteers show up and complete their tasks without so much as a hiccup. They keep things running smoothly and efficiently. They can sometimes be overlooked, but it is very important to acknowledge their contributions continuously. Without them, the more visible volunteers would have no resources with which to work. Maintenance is difficult and we need to be sure to thank the people who accomplish the mundane.

#### **The Maintenance Volunteer**

- *shows up and completes tasks.*
- *keeps things running smoothly and efficiently.*
- *can be overlooked.*
- *does not often get the resources needed to succeed.*

Not only are these volunteers often overlooked, but their tasks are also overlooked. Consequently, they do not get the face time nor resources they need to continue to succeed. When each person understands everyone else's roles, and the roles of the tasks within your organization, your tasks will become easier and your organization stronger.

### 2.2.2 The Designer, Planner, and Scheduler

The designer, planner, and scheduler have “visioning” capabilities similar to those of the entrepreneur and the builder; however they often think and plan but do not necessarily take action very well. Some can see an entire event in their mind but not necessarily lead, manage, and have the chats with folks to get the very same work accomplished.

Are you a former architect, estimator, or conference planner? If so, perhaps you like to stay back in the shadow and design and plan and take care of those details that often get overlooked in many plans and schedules. Managers, these quiet and reserved folks can be a godsend to your more visible and extroverted volunteers. Watch for them, they are quite valuable and coupled with a Builder can accomplish amazing work.

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In small organizations, the entrepreneur or builder may also be one and the same with these designers and planners. In larger organizations, these individuals fulfill a valuable role as they create the documentation, estimate costs, and use the skills and tools necessary to schedule activities. In their pure form, designers, schedulers, and planners typically are introverts who sit in a back room and make elaborate plans for the builder to implement. Small organizations often do not have the luxury of having such a person, but you might consider trying it. Find the volunteer that can fit this role, as he or she will add considerable value to your team.

***The Designer, Planner, and Scheduler***

- *have visioning capabilities.*
- *think and plan, but do not always do.*
- *create documentation, estimate costs, and schedule activities.*
- *are typically introverts.*
- *need access to the volunteers who actually do the work.*
- *need to get out on location on occasion to remain grounded.*

Understand also that these types of individuals should not work alone: you can put them in the back room, but you cannot leave them there permanently. They need access to the volunteers who actually do the work (rather than just those who plan the work) and they need to get out on location (see the work) so they can develop plans and schedules that are as feasible and as practical as possible.

### 2.3 Who Are You, Volunteer? Who Do You Manage, Manager?

In summary, we have considered several types of volunteers that you may well be, will encounter in your organization and work with or for, or that, as a volunteer manager, you need to place and subsequently manage. Both the risk-takers and the risk-averse are necessary for your organization to survive and thrive. The ideal is getting the right people assigned to the right roles and for you, volunteer, to ask for and step into the roles that fit you best. Putting volunteers who are risk-averse in charge of initiating and executing all of your organization's activities could result in very stressful situations for your entire team. Everyone will shine in situations in which they are comfortable and capable.

**Table 8—Key Points to Remember from this Chapter**

- *Volunteers, you need to find your place.*
- *Managers, you need to help volunteers find their places.*
- *Risk-takers and the risk-averse are both necessary to an organization.*
- *Types of risk-taking volunteers*
  - *The Entrepreneur*
  - *The Builder*
  - *The Doctor*
  - *The Closer—Type 1*
  - *The Closer—Type 2*
  - *The Pure (Project) Manager*
- *Types of risk-averse volunteers*
  - *The Maintenance Volunteer*
  - *The Designer, Planner, and Scheduler*

**Remember, managers, volunteers are donating their time and effort.** You want them to continue to do so. Helping others find their places will result in a positive team environment. **Remember volunteer; make an effort to find your niche.**

We hope this chapter has helped you determine where you fit or has provided you with more detail about finding an organization where you can explore skills you may want to learn. Everyone needs to make good choices. Understand who you are and where you are and donate your time to your favorite organization or cause.



### 3 Retaining Volunteers

*“People often say that motivation doesn’t last. Well, neither does bathing, that’s why we recommend it daily.”—Zig Ziglar*

If you want to be a great volunteer or manager of volunteers, and if you want your organization to thrive, you all will need to learn how to be a part of a whole. You need to learn to be kind and emotionally supportive of one another. This will help build capacity and retain your volunteers. We also believe that to retain volunteers everyone in the organization needs to understand who and where they are, that the leaders must “enforce” a healthy organization, and that a solid behavioral foundation must be built to stand the organization on. We simply believe that healthy behaviors and patient understanding retain people in organizations—not posters on the wall and Tuesday afternoon motivational sessions. Freedom to believe and contribute in an emotionally safe organization will keep your folks around and giving more each day. People gravitate toward health—create it and you will have more labor than you need and retention will be overwhelming.

***To be a great volunteer, or to be a great manager of volunteers who helps an organization thrive—you will need to learn how to be a part of a whole, and how to be kind and emotionally supportive of one another.***

In addition, fitting in, staying engaged, and avoiding volunteer turnover will provide the organization with a core group of volunteers who know one another well and can work efficiently together to complete the organization’s tasks and keep the organization moving forward. Without healthy individuals and a healthy work place, it can be difficult to organize and motivate, difficult to cultivate the loyalty of each to one another, and to set and accomplish important priorities.

One of the most crucial components of maintaining your organization’s health is to ***know yourself and your organization***. For if you do not know whom and where you are today, how will you be able to move forward tomorrow?

**Assess the “level of health” of individuals and the organization regularly.** Walk around, chat it up with folks (this is particularly important if you are part of a virtual organization—make phone calls if you have to, get past the email), get to know people as co-volunteers. Ask your colleagues for input as well. It is much easier to introduce or improve efficiencies when the environment fosters such improvements and trust is in the air. Creating a sense of community and a pleasant organizational atmosphere requires considerable energy from the volunteer and considerable leadership by the volunteer manager. Everyone needs to bring a positive and uplifting attitude to the shop on most days.

#### **Table 9—Chapter Overview**

- *Knowing Where—and Who—You Are*
  - *Leadership vs. Management*
  - *Understanding Who and Where You Are*
- *Building the (Cultural) Foundation*



A healthy organization requires a strong and confident leader with good management skills. Health in an organization needs to be enforced. Problems linger in units and on teams in which the manager does not affect the change needed to keep the environment safe and successful. The tools and techniques described in Part I of this chapter can be rewarding, but they are not for the faint of heart. Strong, confident, careful volunteer management and leadership are required to make your organization the best it can be. Volunteers, you must support your manager and be a good colleague and undertake a little managing up—support, motivation, and management should work both ways. In a subsequent chapter we will show you just how important it is to support your leader / manager via a little analysis. For now, though, know that they need your help; you need to get to know them well so that you can offer suggestions as they are needed. You need to support the boss, guide the boss, and teach the boss what your job and the jobs of those around you are like. Managing up is quite a skill and should be studied more. A quick Google search will find you a mountain of materials. However, after you sift through those, you find that communication, trust, loyalty, support, some upward motivation, and some everyday help will be the keys to successful upward relationships.

In the following discussion, we hope to get you to think differently about 1) your organization's health, structure, and strategies and, most importantly, 2) each other. We will provide you with an implementation plan and the starting point for action-oriented management of, and participation in your organization. Follow these steps and you will be on your way to solidifying your personal place and your base of volunteers.

### 3.1 And, a Special Note for You Managers

***Remember, managers, that you are working with volunteers, not employees, and thus they are not forced to be present to collect a check.***

***If people feel they are not valued they will not come back. They are free to leave at any time and move on to the next organization.***

***Therefore you must seek out any underlying tensions and address them immediately to prevent them from dragging your group down.***

***As a leader and a colleague you want to give people the opportunity to constantly evolve, adjust, and improve. This means that everyone needs to learn, grow, and accept constructive criticism—including you!***

***Volunteers must want to be present. Your attitude about the organization and your tasks/events will be contagious, so make it a good one.***

## 3.2 Part I: Knowing Where—and Who—you Are

### 3.2.1 Management vs. Leadership

It seems that nobody wants to be a manager anymore and no one likes to be managed. Everyone, it appears, is an island, thought leader, and new-age employee or manager. This situation will not lead to an effective and productive level of effort. The popular choice is for all to be leaders/warriors. Leadership—not management—programs are all the rage, whether for the individual or organization. Many years ago, a Native American mentor lamented that everyone thinks he is a warrior, but there really are so few. True warriors and leaders often pay a high price personally to effect change; consequently, they are very hard to find and very hard to keep alive and engaged in any one place for very long.

Leadership skills are not the same as—nor should they replace—management skills. Rather, they should enhance them. Both are necessary. Kouzes and Posner (1987) have written extensively on these topics. They summarize that *Leadership* is the act of setting a vision, being innovative, inspiring, and/or spearheading change. A leader sets the direction and inspires a belief in the idea and in the volunteers of the organization. Leadership does not just come from above—anyone can be a leader at any level of the organization.

**Leadership is the act of setting a vision, being innovative, inspiring, and/or spearheading change.**

They also differentiate that *Management* is the ability to direct, control, and achieve based on a pre-established vision, direction, or plan. A manager executes by directing resources to achieve an objective. Successful management is goal-, benchmark-, and deliverable-based execution. Manage yourself and manage others as a peer or volunteer manager.

Leadership skills are important, and much is written these days about their value. **However, we believe that people must be skilled in the art of management for an organization to find sustainable success.** Individuals must manage themselves and managers must do the same as well as manage others. The work must be *implemented*, not simply planned out and discussed in meetings. Implementation and execution are key to everyone's success.

**Management is the ability to direct, control, and achieve based on a pre-established vision, direction, or plan.**

It is wonderful and even necessary to have someone with the vision and capacity to plot a course to a brave new world. That is leadership. But what is the value if no one is capable of working toward achieving the goal—i.e., of taking the sometimes boring and methodical steps necessary to accomplish the work? We must develop and employ great managers of people; we must all work toward managing ourselves in a purposeful and fulfilling manner. So let us begin that journey with a few suggestions about how to build the organizational foundation that will lead to robust execution.

### 3.3 Understanding Who and Where You Are—“KY... Analysis”

Successful volunteer organizations know where they are because their people, their managers, and their leaders continually perform a “Know Your” (KY) analysis throughout the organization. We learned this from playing sports—we had coaches who would constantly repeat “Know Your People.” You absolutely must know who to go to, who can do what task, who performs under pressure, and who can perform what play (think work) at any given moment in a contest. You had to know the skill levels and characteristics of each of “your people.”

#### Know Your:

- Culture
- People
- Product
- Self
- Audience

This analysis helps to build a foundation of success and purpose that keeps all volunteers engaged on multiple levels. As volunteers and volunteer managers, you all need to know to whom to report, where you fit best, and to whom to delegate critical aspects of your tasks and events. For example, who can best handle stressful situations? Do you have a particularly good “people” person to work with the public? The following sections will further detail the KY analysis, which we expand to include knowing your culture, your people, your product, yourself, and your audience.

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### 3.3.1 Know Your Culture

Volunteers, to keep your organization healthy and moving ahead, you should understand your organization's current position in the "marketplace." Thinking geographically, this means taking into account the many differences that may affect your environment. Are you in a rural or urban environment? What regional characteristics affect your team's tasks and events? Your "culture" also consists of your organization's structure—is it top-down, bottom-up, hierarchical, or egalitarian? What population (and thus culture) does your organization serve and how does it do so? How does the sector in which your organization is in affect your people and your team's performance? Managers, who make up your volunteer population (related to know your people!)? You need to understand the regional and local culture of the organization within which you work. Keeping this culture in mind will help you avoid making mistakes both in managing and participating day in and day out and improve your (and your team's) performance.

**Know Your Culture.**

- *Understand your position in the marketplace.*
- *Think geographically.*
- *Know your organization's structure.*
- *Know the population your organization serves.*
- *Know your volunteer population.*
- *Assess morale.*

It is also important to assess the morale in your organization on a regular basis. As a leader, as a manager, and as a teammate volunteer, you are responsible for laying-out, or helping to lay-out, the foundation for great work, change, and success. You need to know how much trust must be built to be able to begin the processes of participating within a group, and to organize and manage good work. Maybe you will be lucky enough to walk into a unit that is ready and eager to work, learn, build, and grow. But seldom is that the case. More often, we must invest significant time and energy in development before we can think about reaching our potential and achieving organizational success.

### 3.3.2 Know Your People

This KY step is primarily for the volunteer manager. Each of your volunteers has made a choice to join your organization and give up some of his most precious resource—time. We need to understand that each individual has a particular set of drivers and wants to be present for a variety of reasons. Volunteer managers, it is extremely

#### **Know Your People.**

- *Build relationships.*
- *Know the people who report to you, who work alongside you.*
- *Match appropriate people with appropriate tasks.*
- *Foster an open environment.*
- *Facilitate others' success.*

important that you get to know your people well. It is simply good management to take the time to build relationships with your people in order to learn more about who they are and how they want to contribute. You should build a special relationship with each individual who reports to you and works alongside you. What are their interests, likes, dislikes? What are their kids' names, their pets' names? Where do their skills fit in your organization? Matching appropriate people with appropriate tasks will keep your organization running smoothly and will keep your volunteers feeling respected and productive. Fostering an open environment will also result in your volunteers speaking more freely and contributing their ideas for the organization's success without fear. Facilitate others' success where you can, rather than facilitating your own. If they succeed, you succeed, and your organization succeeds.

### 3.3.3 Know Your Product

What does your organization offer? What are you charged with accomplishing? You personally and organizationally should have a clear vision and/or mission statement and know what you are agreeing to deliver. If someone asks you what your organization does, can you explain it all well? If you want to deliver great products and/or services, everyone throughout the organization needs to be knowledgeable about those products and services and be comfortable promoting them to others. Volunteers need to become experts in what they do, and volunteer managers need to understand what everyone under their purview contributes. Know, too, what you **do not** deliver. Do not try to be all things to all people. Your group or organization offers a particular service or product so do those well. Be careful in adding goods and services at a moment's notice for the sake of revenue or prestige. You may not get the result you are looking for in the long run.

### 3.3.4 Know Yourself

Perhaps the most important aspect of knowing yourself is knowing what you do not know. We are repeating ourselves a bit here as this can be one of the most important items to think about and act on each day of your service. This is important for all, volunteers and volunteer managers. Managers, understanding this can help you move forward, set priorities, and decide what you personally and/or your unit can take on. What you do not know provides important information about whom to add to your team, when you need to seek help, and when you need to let something go. We are strongest when we know what we can and cannot do. We also need to be “present” and to know what we are best at, when we are best at it, and how best we can contribute. We need to know how to articulate these concepts to our peers and our group. We cannot know everything (nor do we need to), but understanding who we are and who we are not can position us to succeed.

**Know Yourself.**

- *Know what you do not know.*
- *Know what you can and cannot do.*
- *Be “present.”*
- *Know what you are best at.*
- *Know how you can contribute.*



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### 3.3.5 Know Your Audience

Whom does your organization serve? Senior citizens? Underserved youth? A church? Both managers and teammates must be able to define whom you serve. Without this information, it can be difficult to establish clear objectives. It can be quite helpful to ask for input from the group you are serving. Do you have a suggestion box? A website where the public can leave feedback? You need to frequently inspect your organization's goals to ensure you are providing the services that your target group needs, not what you think it needs. This is extremely important for all.

Take time to understand, to Know, who you are, where you are, who and what you manage, and what you deliver. Know yourself and know your people. Know your people's work styles, but know your people as human beings as well. Take an extra five minutes to build the relationships that help improve work and the workplace in addition to conducting that business. Visit slowly so that work and management can go quickly. Choose to take time to build relationships with staff and colleagues—perhaps over a cup of coffee or a light lunch—rather than lose time to clarifying (or, worse, arguing about) your work.

#### **Know Your Audience.**

- *Know whom you serve.*
- *Inspect your organization's goals.*
- *Provide the services your target group needs.*

## 3.4 Part II: Building the (Cultural) Foundation

Volunteers and volunteer managers, it is also quite important that you help lay a positive and productive foundation for your organization's environment. This helps to ensure that good work is accomplished and a good product is delivered. Creating and maintaining a healthy environment can be easy to chat about, and/or describe on paper. However, it is also most likely a very difficult climate to implement. The process of insisting on health can be quite lonely for an individual that speaks up and for the team lead required to manage, but it can bring lasting rewards. Keeping the high ground and insisting on "health" is challenging, but again, well worth the effort.

***Help to lay a positive and productive foundation for your organization's environment.***

**Do not short change yourself. Healthy behavior begets great products and services and leads to long-term sustainability for the organization.**

The norm for new volunteer participants and volunteer managers/leaders is to assume that once volunteers are engaged, the organization is ready for them and the team is ready to embark immediately on its tasks. But teams and organizations—or, more specifically, the people on and in them—often are not ready. They may be hindered by the organization's "health" issues, as well as knowledge that needs to be transferred and skills that need to be developed.

Just as professional athletes train, so we too must train so that our personal contributions can be effective, useful, and purposeful and so all can perform to the best of their ability.

***Just as professional athletes train, we, too, must train, so that our personal contributions can be effective, useful and purposeful and our team and organization can perform to the best of their ability.***

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Often, the cultural foundation of an organization needs to be reworked and/or established: you may need to clarify some ground rules for your own participation and behavior, and if you are a manager you may need to help your folks do the right things. Often, simply getting people to get along may take some extra effort and need to be enforced. You and your teammates are there voluntarily, but if you all do not cooperate well together, you cannot necessarily perform very well together. Team dynamics are quite important. There is much more to be read in the project management literature on managing teams and we discuss it much further in Chapter 4.

The following section offers guidelines for building and maintaining your personal and your organization's "healthy" cultural foundation. Each quality listed is accompanied by an action to help you achieve it.

**Honesty** is a crucial component of your personal and your organization's healthy makeup. If you are always honest, the people will remember you for it. In practice, we often are guarded and are fearful of being too forthcoming. We worry about being taken advantage of or cheated. We distrust. But we suggest flipping this on its head. Assume that people will be honest and will cooperate if they are given the opportunity to be truthful, straightforward, and heard. Be honest with your teammates and team managers, and expect them to be honest with you. Give all the benefit of the doubt, and they will repay your honesty ten times over. Your teams will appreciate this and rise to the occasion. And, it sure makes life a whole lot simpler. When you make a mistake, acknowledge it to your employees and yourself. Make amends quickly, and expect that people will continue to trust and understand; after all, we are human beings, and thus fallible.

**Healthy Organizations Require:**

- *Honesty*
- *Empathy*
- *Loyalty*
- *Trust*
- *Integrity*
- *Ethical Clarity*
- *Compassion*
- *Respect*

**Action: Choose to be forthcoming and honest. Trust someone new.**

You must also develop and practice **empathy**. We often hear that we need to be "active listeners." While this is certainly important, we contend that if we have empathy and truly want to be a good teammate or facilitate others' success, then there should be no need to practice active listening *because we already care and are present*. We should not have to think about listening at all. We always listen (some days we may listen more or less attentively, depending on how busy or tired we are), but we should never need to think about listening. If we practice empathy, we will hear what is said. If you practice empathy and lead by example—and ask others to do the same—then your organization will be well on its way to building a strong foundation.

**Action: Tomorrow, practice empathy rather than active listening.**

No organization will get very far and find sustainability without **loyalty**. Today, it seems that many people either do not comprehend (or simply are not willing to undertake) what loyalty requires. Create a team, be a good teammate, build some trust, demonstrate that you will protect your team and each other, and thereby cultivate loyalty. Neither you nor your team members will have to expend energy watching your back; instead, energy can be directed fully toward more and better work. Do this consistently, and soon you will find that yours is the over-achieving team.

**Action: Tomorrow, protect your team and teammates—from the noise, the politics, and the unfair—as best you can. Be loyal, read up on loyalty.**

Do so, and your team will repay you with loyalty. Teaching loyalty can be difficult, but the benefit to you and your unit can be significant.

**Trust** is built an inch / a day at a time. And oh, it can be lost so quickly. If you practice the healthy-behavior-building techniques we suggest, trust will ensue. Choose to trust before you have evidence to do so, and most important, always do what you say you will do. Consistency aids the trust-building process. You may have to take a few more notes and invest a little more effort, but when problems arise or you drop the ball, your co-workers, teammates, and teams will feel more comfortable being honest with you because of the healthy choices you have made or healthy environment you have helped create.

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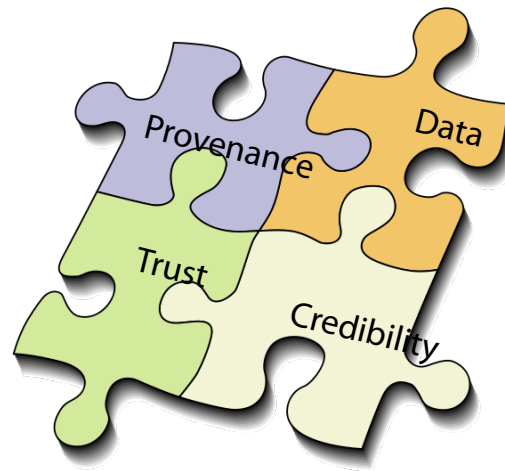
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**Action: Tomorrow, choose to trust, and do everything you say you will do.**



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It would be fine if at our funerals nothing were said but that “he had integrity.” **Integrity** has been described as “honor in practice.” Integrity also can be defined as *doing the things that are necessary to create a healthy environment despite the costs*—in particular, costs to the individual and as a leader/manager. Practice integrity by striving to become a great volunteer and/or a great volunteer manager and coworker. Learn constantly about management processes and healthy organizations, and then apply that learning to your participation in your organization. Think before you act or speak; care for and nurture your teammates; help to create a pleasant team environment.

**Action: Tomorrow, practice integrity. Think about integrity—would folks say you are trustworthy? People will follow your initiatives, and everyone will be better off.**

Make sure to establish **ethical clarity** for yourself, your team, and within your organization. Nearly every organization has an ethics policy, and nearly everyone *wants* to practice good ethics . . . but whose ethics? To function properly, your organization must *know* its ethics prior to needing to put those beliefs into practice. Volumes about ethics have been written, researched, practiced, and argued, but ethics do not have to be complex. In fact, the policy should not be complex. Nevertheless, it must be defined, and all volunteers must know the organization’s expectations. Examine the organization’s policy and practice.

**Action: Tomorrow, create a one-page ethics policy for your organization if it does not exist, post it up if it does, and point it out to all.**

**Compassion** means understanding others' troubles and then taking action to help correct them. We need to care about our co-workers, teammates, and bosses. Help to lead them by showing some compassion within the organization. Be sincere (we say, "be compassionate and empathetic"), and, most important, take action to correct what you can. When you can, give your teammates positive and healthy options for overcoming their struggles. Managers, this is particularly important for you.



**Action: Tomorrow, walk a few steps in someone else's shoes, learn what they need, and then take some action. It sounds a bit cliché, but it is so needed in practice.**

**Respect:** A GrosVentre Sioux mentor on the Fort Belknap Reservation said, "For if you respect others that do not respect you, then you have no self-respect." We must respect ourselves so that we (1) can respect others who deserve our respect and (2) can work with and manage others (as it is within our authority to do so) in order to maintain a respectful environment. We can disagree, but we must do so in an educated, informed, and mature manner. We think it was Benjamin Franklin who said "the sign of an educated person is to be able to argue without anger." Put the issues before the personalities, give each other the benefit of the doubt, and this will become a whole lot easier.

**Action: Tomorrow, provide respect (start with being polite and civil) to all you work with and whom you serve.**

Monitor the result: You will get fathoms more in return than you might expect. Finally, remember in all of this that someone has to go first. Let it be you. Take a few lumps and some risk for the team (if need be), and be the catalyst for respectfully helping all to do their jobs well.



### 3.5 Summary

The organization needs all of you to contribute to the health of the organization, and the retention of each other, to provide the best service possible, lending to the long-term sustainability of the cause. This is not optional. Volunteerism particularly requires continuous monitoring, touching, motivating, engaging, and a level of gratitude that has not been necessarily required in the past (due to our enhanced need for purpose) and that is not always found in the “paid” workplace. Remember, everyone engaged is giving up that precious resource—time—to serve others. We need to encourage, communicate often, and let each other know what we are capable of and what we all are grateful for. Simultaneously, volunteer, make sure you are not spending so much time volunteering that it is interfering with the rest of your life. You need complete health and balance in all you undertake. You do not want to burn out or you will lose interest in your volunteer commitment. Pay attention, volunteer managers—don’t ask for too much and do not push too hard.

We all must actively care about each other as we care about the service we provide. Be willing to knock down the barriers that block progress toward organizational health as individuals and managers. Such continuous coaching of one another requires attentiveness, caring, empathy, and time. You, volunteers, provide exceptional services to many people and organizations.

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Remember, too, that rewarding your peers is important. Even small gestures of recognition make a big difference in people's lives—especially since they are volunteering their time and effort. Rewards need to be important, sincere, and real. They can be great motivators and morale-boosters within your organization. Single out the people who can be an example for others to follow. Give out a few awards or certificates. Recognition (see Chapter 9) is so important. Gestures of gratefulness go a long way. A healthy environment goes a long way toward providing long-term organizational, and thus service, sustainability.

**Table 10—Key Points to Remember**

- *You need to learn to be a part of a whole.*
- *Organizations need to retain volunteers.*
- *Keep the organization healthy.*
- *A healthy organization needs a good manager.*
- *Understand who and where you are.*
- *KY... Analysis is important.*
  - *Know your culture.*
  - *Know your people.*
  - *Know your product.*
  - *Know yourself.*
  - *Know your audience.*
- *Building a cultural foundation is important.*
  - *Keep your organization healthy.*
  - *We must continually train.*
  - *Qualities necessary to build a cultural foundation:*
    - *Honesty*
    - *Empathy*
    - *Loyalty*
    - *Trust*
    - *Integrity*
    - *Ethical clarity*
    - *Compassion*
    - *Respect*

## 4 Working with Teams

*Life can be a whole lot more difficult and most certainly lonely unless you have a team to share your wins and losses with.*

The concepts of teams and teamwork are omnipresent today. There simply is not a day that goes by that in some conversation or another, work-related or personal, we do not espouse their virtue and/or criticize their dysfunction. We praise teams, we whine about them; we celebrate and compete with our teams and teammates. But sadly, if we do not have a thorough understanding of how they work, a “team” could be just a world of islands and silos unable to communicate efficiently and work toward a common goal. **Teamwork is an integral part of any volunteering organization.** Thus, volunteers, it is crucial for you to understand how to be an effective team member. And volunteer managers, you must understand how to be an enlightened team leader. We need to learn what makes good teams great and how that can lead us all toward organizational sustainability.

**Teamwork is an integral part of any volunteering organization.**

We love our teams; we hate our teams. Sometimes they are great and other times they are a mess. But in whatever form they come, they are crucial to volunteer-based organizations. For the best results on your team’s tasks, you should help your team shine by being a good leader and teammate.

Why do teams fail? Often they fail because of poor or weak management and failing team member practices. Egos get in the way. People lose sight of the objectives. **Some teams fail because their members simply do not take enough time practicing teamwork.** It is an acquired skill that you can learn and that you can teach others.

**Table 11—Chapter Overview**

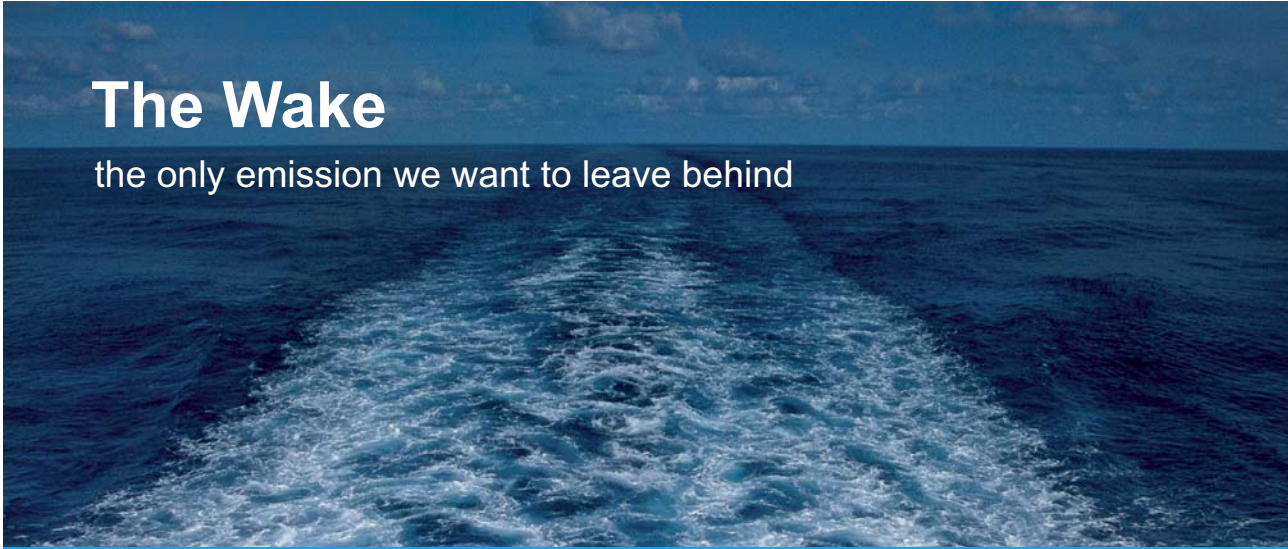
- *Building Great Teams*
- *Team Failure vs. Team Success*
  - *Start Making Choices*
  - *The New Paradigm*
- *Maintaining Healthy Teams*
- *Why Do We Do These Things?*

In the following pages, we will take you through the aspects of teamwork that we find most useful for volunteer organizations. We suggest that you focus on one of the concepts each day—it’s easy to learn them when you can digest them in small units. These will give you a good head start to strengthening your team and your organization.

We will also provide you with some reasons why learning about teamwork is so essential. We believe you can and should set your mind to help manage subordinates, and each other, to be a part of successful teams. You often need to establish a new paradigm and consciously choose your behavior rather than falling back on existing paradigms. A good team “build” starts with a choice: a choice to trust one another, to trust your team leader and team members. We must assume going in that each person will be a contributor, and not an antagonist. Otherwise we begin behind.

Since, in our experiences, not enough emphasis is put on the team part of teamwork, it is no wonder we have so many half done or poorly completed projects. **We often find that teams do not go the distance, do not know how to win together, and thus, never close a project completely. It seems then, they never have an opportunity to celebrate with one another to reinforce that great teamwork paradigm that can be accessed another day for a subsequent project.**

For if you never really had a team or teammates at the onset of a project, where would be the desire to cross the finish line together, call a project a win, and celebrate? Closure is difficult—we must learn how to win. Great organizations and volunteers have perfected the close; they know how to work hard with one another, know how to dig deep, and thus comprehend the effort and passion associated with finishing strong as a unit (i.e., team).




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## 4.1 Building Great Teams

In order for you and your organization to function effectively, you must build a strong team mentality. The terms and phrases in this section will help you think about how to do so. Actively teach yourself these concepts, get multiple opinions on each, and move forward with the day in and day out tasks of being on and leading your team toward the finish line. Please note: all team members are managers and leaders. The responsibility associated with success does not just fall on the lead. Team support is a multidimensional charge where the third baseman is as important as the coach, the pitcher, and the trainer. When you meet with your fellow volunteers, share this information with them.

**Table 12—How to Build a Great Team**

1. *Have a work plan.*
2. *Communicate effectively.*
3. *Establish clear team objectives.*
4. *Motivate yourself and others.*
5. *Make decisions and set priorities.*
6. *Assess your team's skill set.*
7. *Create a vision of success.*
8. *Lead by example.*
9. *Move forward with constructive criticism.*
10. *Care about your team.*
11. *Facilitate others' successes.*
12. *Have fun.*

## 4.2 How to Build a Great Team:

1. **Have a work plan.** All team members need to know what they are supposed to do, as well as what everyone else is supposed to be doing. The team's purpose should be clear. You must take responsibility for your team and protect it. Over-organize the start and celebrate the finish.
2. **Communicate effectively.** This could involve phone calls, email, meetings, and documentation. You need to develop meeting skills and always over-prepare for team meetings. Encourage your teammates to communicate effectively and thoroughly with one another. Last we checked, human beings cannot yet read minds.
3. **Establish clear team objectives** and expectations and make sure your teammates know them. Write them down and make sure everyone has access to them. Divide large objectives into smaller, more manageable ones. Define the outcome well.
4. **Learn how to motivate yourself and others**, but do not rely exclusively on motivation to complete your team's tasks. A healthy organization and strong team beats working alone.
5. **Make decisions and set priorities.** Get input and feedback from your teammates.
6. **Assess your team's skill set.** Know your teammates and know yourself. Delegate appropriate tasks to those teammates best able to complete them. You should also acknowledge that these are volunteers, and that some of them will be seeking more guidance in their tasks than others. Pay attention to one another, volunteers. Pay attention to the needs of all, managers.
7. **Create a vision of success.** Believe in your team and its objectives. Eliminate barriers. Feel the end point and see the win.
8. **Lead by example.** Be positive, clear, and consistent. Coach your teammates.
9. **Move forward with constructive criticism**, not backwards with insult and envy.

10. **Care about your team.** Learn about your teammates—chat with them on a regular basis. Praise them. Listen and empathize. Deal with bad apples—turn them into cider ASAP! Resolve conflicts quickly, as they arise. Address any anxieties.
11. **Facilitate others' successes.** Praise them in public, and criticize (when necessary) in private. Share the credit of your successes and you will exceed your own objectives.
12. **Have fun together!** Share meals, create a fantasy football league, do a ropes course. These are great ways of getting to know your teammates and build stronger relationships with them. Again, eat together often.

## 4.3 Team Failure vs. Team Success

### 4.3.1 Start Making Choices

In this section we will chat about project and team success rates and the choices we can make at the onset of a task to be successful. We will assume that a successful team will have a successful task. Let us examine Figure 1. There are four quadrants in our graphic and we assume that a bad team or a bad leader can lead to a difficult or unsuccessful task. Simply put, one negative makes the quadrant difficult at best. Let us assume that half of the teams understood teamwork and task management and half did not. (Some would argue that we are being quite generous.) Upon closer inspection we can see that we have a high probability of success in just 25% of the work we initiate.

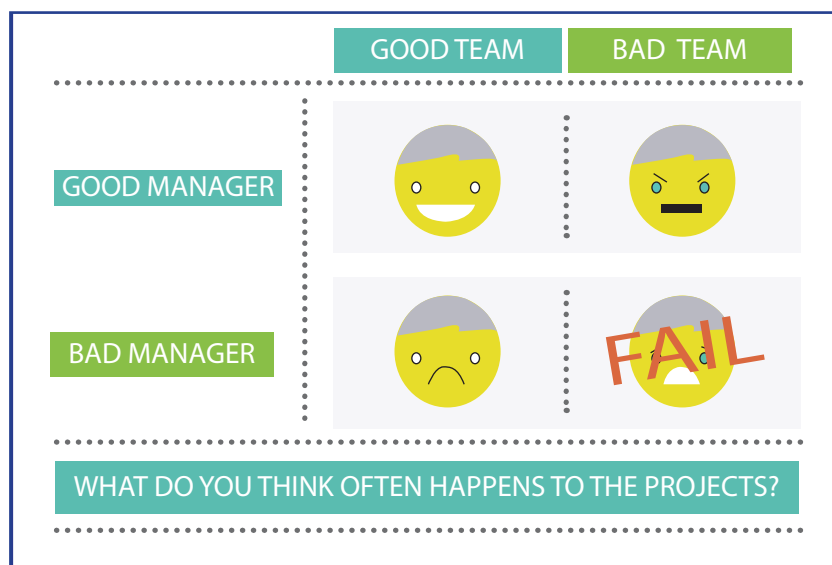


Figure 1—Team / Manager Matrix Making Poor / No Choices

We can also see from the matrix that teams can expect that 50% of their tasks will have troublesome issues prior to the start and 25% are ready for the grave before they even begin. When there is a bad team and a bad manager, we can expect that any given task may be a disaster. Can we live with this result? We do not think so.

Our lack of team understanding and team management skills and our ineptitude will hinder tasks from being successful. We cannot emphasize enough the importance of healthy teams and healthy team choices. How do we change the above paradigm? We make healthy and positive choices without regard to where others may lay on the graphic. We need to eliminate posturing and politics and choose to make positive choices despite where we may find ourselves beginning. We must set aside and ignore our individual issues, any blaming that may be taking place, and the lack of personal responsibility by other members of the team. We need to choose to have a good attitude and thus choose to start a task with the best foot forward to help all find success. We do this in part by making sure we are always backing up the person on the team who just doesn't get it, or who perhaps has a bad attitude that cannot be fixed in the short run.

#### 4.4 The New Paradigm

We must make contributing choices. We as team members or as leaders and managers must have a little more patience in all matters, including inexperience. We must always keep our objectives in mind and maintain a positive, forward-looking attitude.

In the Figure 2 below, we have changed the “bad” headings from Figure 1 to “inexperienced.” Moving two or more of the quadrants into a higher probability of success is not only desirable, but entirely possible through good choices!

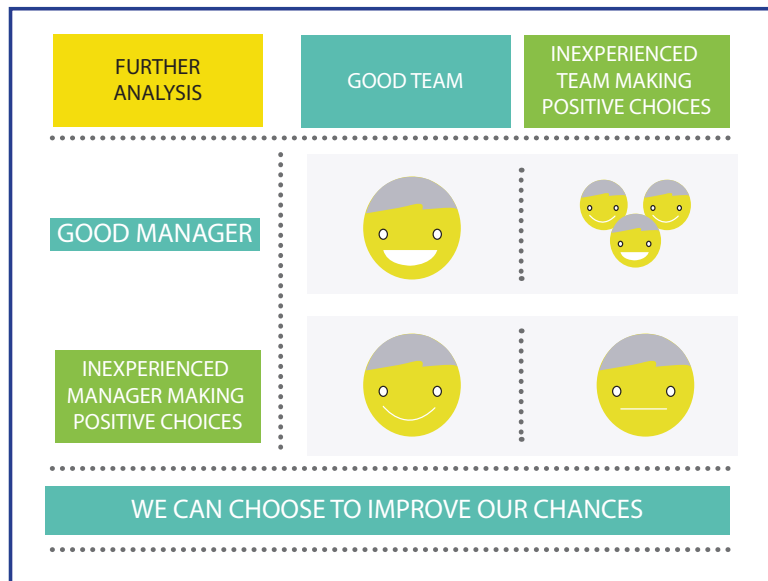


Figure 2—Team / Leader Matrix Making Positive Choices

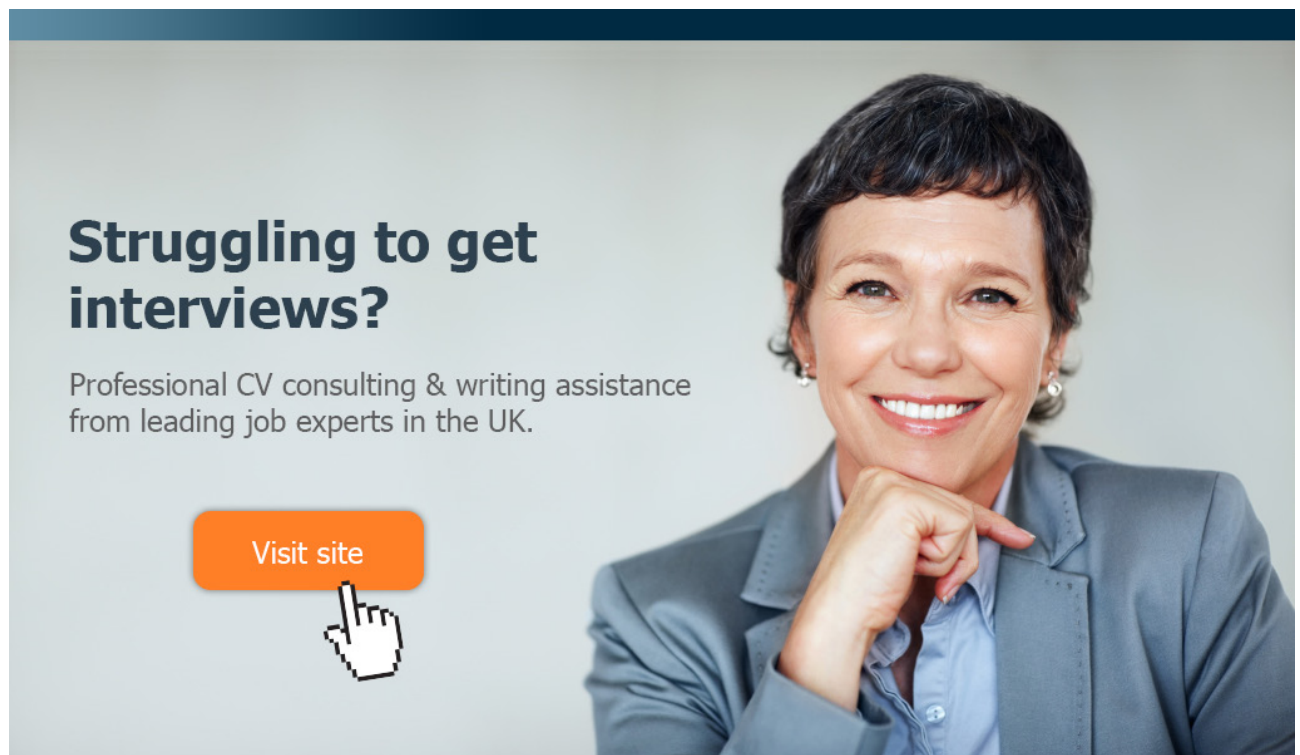


You can succeed from the onset by making good initial choices surrounding cooperation and trust and all of the other team virtues we discuss above. We see in the above graphic that we can make positive choices with inexperienced individuals that can turn a failure into a win (as is shown in quadrant 2 and 3). As a volunteer manager, move into tasks slowly and patiently and you might even be able to turn quadrant 4 around. As a team member, you need to be helpful, trusting, and kind to one another. Understand that everyone must keep an open mind and learn new things. **Attitude is a most important choice up front. Choosing to be helpful provides for greater probability of success.**

Winning teams find ways to win all the time. They learn to win. In addition, once you know what winning feels like, you will seek out further wins with greater confidence. Part of creating a winning team is learning to trust one another. Unfortunately, we see less of this trusting behavior than we believe we should. It is not normal for people to wake up and choose to trust. Mostly, we start out very guarded and protecting.

**Winning teams find ways to win all the time. They learn how to win!**

We would argue, though, that you should give it a shot—trust your teammates to do the right thing. Ignore the gripes of teammates who do not deliver, set them aside and do not grease their wheel. If you contribute, even in spite of setbacks and naysayer attitudes, rewards will come most of the time. When they do, make sure your team's win includes some fun, meaning take the time to enjoy each other's successes and celebrate!



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## 4.5 Maintaining Healthy Teams

Just as building a great team is essential to fostering success in your organization, you must also learn to maintain it. In this section, we will provide you with a list of actions we believe everyone needs to maintain healthy and productive teams. Recall that you and your teammates are volunteers, not permanent, paid employees. Healthy teams can win quickly, but unhealthy teams can also lose quickly in that folks will not stick around long if they are participating on poorly managed and losing teams. Volunteers will be quicker to walk away, so preparing the foundation of health is vital.

We want you volunteers to think about the guidelines below. Each comes with a responsibility to be a good team member and/or team manager. Work and practice hard at being a good teammate no matter where you are in the organization. Your effort will be contagious. At the end of the day, all we really have is each other. Tasks come and go; they change based on the external environment. Some of the tasks will be less enjoyable than others. Sometimes, it feels as if we are merely moving the pile of dirt from one side of the field to the other and back again. Nevertheless, if we are moving that dirt with a good bunch of teammates, the dirt becomes less important and the time you spend with the folks running the hand shovel or the backhoe can be very enjoyable.

**Table 12—How to Maintain a Strong Team**

- *Be grateful and graceful.*
- *Be patient, handle and manage delay, be calm, understanding, and tolerant.*
- *Be friendly, have empathy, be generous with praise, be genuine.*
- *Do not be resentful of others' successes. Congratulate them.*
- *Have pride without ego, be humble, avoid boasting, and share credit.*
- *Facilitate others' success.*
- *Be respectful to all, especially your mentors and subordinates.*
- *Do not pursue only your own self-interest. Help everyone succeed.*
- *Be strategic, but not self-serving and selfish.*
- *Control your reactions; be calm in chaos.*
- *Forgive others for mistakes; help them change tasks if need be.*
- *Do not seek pleasure in misfortunes. Have empathy and be supportive.*
- *Praise integrity and sincerity, have integrity, and be sincere.*
- *Protect, be loyal, and teach loyalty. Reward loyalty over achievement.*
- *Trust. Have confidence in folk, and they will have confidence in themselves.*
- *Empower others to take the lead.*
- *Expect the best out of your team and they will do their best.*
- *Be persistent. Never let anyone tell you to quit.*
- *Do not listen to others' negativity.*
- *Never abandon your people.*
- *Help all to have purpose and make sure they understand that purpose.*
- *Help make volunteering fun. Avoid gossip and rumor.*
- *Share success, and more success will come.*
- *And, be grateful again and each and every day you have others to share with.*

Do all of these things and you will not have to worry as much about motivation, honesty, fairness, and the “pop” culture of the day’s teamwork lessons. It will all come along nicely, and most projects will be successful. You will have many winning seasons, and take home a few championships along the way.

#### 4.6 Why Do We Do These Things?

We believe that creating a good team is primary and the actual volunteer work is secondary. Educating yourself and others about teamwork will result in multiple rewards, such as:

- Higher success rates with your tasks,
- Less stressful tasks,
- More personal enjoyment from working with your team,
- Greater retention,
- A stronger sense of accomplishment, and
- More funding opportunities for your organization.

We encourage you to try the strategies outlined in this chapter. If you persevere, you will see results in no time!

**Table 13—Key Points to Remember**

- *To achieve maximum success, organizations need to practice good teamwork.*
- *Build a great team.*
- *Make choices that favor your team’s success.*
- *Maintain a healthy team.*
- *Celebrate your accomplishments together.*

#### 4.7 In Summary: The Little Team that Could

In closing, let us tell you about the “Little Team that Could.”

This was a small group of folks that found themselves with a surprise new boss. This new boss had considerable management experience, but absolutely no experience managing the work efforts of their activities. They could have been quite angered. However, what they did instead was to meet as a group and decide to teach, support, and basically help make this new boss as successful as she could be. As a result, the new boss started well and was empowered to help the group. Within a couple of years all five folks had new titles and responsibilities. Making choices to help others can also be quite self-serving with an added dose of empathy and support. Give it a try—it works.

# 5 Planning for Success

*“Make a Plan, Follow Your Plan, and Change Your Plan”—Dr. Richard Ash, Karl’s Rock Fragmentation Professor, 1984*

At any given time, your volunteer organization has many projects and tasks being undertaken. How can you keep track of them all? You must develop a clearly organized system (personally and organizationally) for keeping track of what tasks and projects your organization needs to complete, what events it needs to plan for, and who is responsible for what. In this chapter, you will learn about how briefs, scheduling, choosing to lead, and paying attention to all details can lead you to project and organizational success. And, while this chapter may appear to be primarily for the manager or leader of many, it is important that all volunteers learn these processes so that they may interface with the whole and also manage their own personal work efforts.

## 5.1 Writing Briefs

Briefs (many times also called “white papers” or “work plans”) are short written descriptions of the plans for any given task. They define the actions to be taken, the schedule, the budget, responsibilities, deliverables, and assessment plans. Anyone in the organization at any level may be tasked to create one. They are often best assigned to those who are closest to the work, those who will be undertaking the work, and those who may manage any people or funds associated with the work or activity.

**Table 14—Chapter Overview**

- *Writing briefs*
- *Scheduling*
- *Paying Attention to the Big and the Small*
- *Choosing to Lead and Manage*
- *Leading Balanced Lives*

Writing briefs for your organization’s various activities will serve a number of purposes.

First, briefs document all activities to be undertaken. And, eventually, they will then also serve as a record of past tasks completed and thus, as a roadmap for repeatable actions moving forward. They make it easy for you to see the progress you have made as well as what you still need to accomplish.

Second, they keep all volunteers moving in the same direction. If people do not know what they are supposed to be doing today, and who is in charge of what, it becomes difficult to accurately undertake current work and plan future efforts.

Third, briefs help us accomplish tasks quickly and efficiently. They allow us to prioritize and schedule, thus ensuring that the most important items will be addressed first.

Fourth, briefs may be necessary to submit to outside parties when you are seeking funding. If you want to be successful competing for financial resources in today's economy, your ability to clearly and persuasively present your plan is crucial.

The following points explain what you should include in your briefs.

1. **Introduction (the “What?”)**

This first section of the brief should define what your task is and what you plan to do. For example, run a conference or a meeting, deliver food to senior citizens, have a blood drive, manage the ski jump at the Winter Olympics. The activities, events, actions, project, and specific level of work effort need a thesis statement of sorts. This is not a section on the purpose of your work. It is simply a statement about what it is. Perhaps you will also want to include a brief history. You will want to contextualize the task for your readers and avoid using jargon that may be specific to your organization, especially if you are using these documents to seek funding from the general public at large.

2. **Purpose (the “Why?”)**

Suppose your introduction is fantastic. The activity becomes something the sponsor, colleague, or boss is quite interested in. You will have grabbed your readers' attention and now they want to know more. This section describes why your organization's effort is important. We delineate why anyone would want to fund it (if applicable). You need to be very persuasive and clearly outline the benefits this task will have for your organization, for your community, or for society. A reader should be able to easily identify an immediate purpose.

3. **Action Steps (the “How?”)**

In this section, you should address how your objectives are to be accomplished. Sometimes, graphs and other kinds of charts can be useful in helping your volunteers (and donors, if applicable) visualize the progression of your tasks.

You should also describe what resources (labor and money) you have or need and how they will be put to use, which helps determine what the schedule will be.

This part of the brief can be tedious, for it requires recording in detail each step of your plan. Nevertheless, such precise detailing will streamline your team's efforts and eliminate “down” time between completed portions of the task. Volunteers will know exactly what they need to do presently and after each step and be able to move forward most efficiently and effectively.

#### 4. Schedule (the “When?”)

In this section, you are committing to accomplishing objectives by given deadlines. You need to be realistic about how long your action steps will take given your resources. If you have clearly outlined your action steps, filling in the schedule will be relatively painless, although it will require some experience in time estimation. If you have not lined out your action steps well, this section will be much more troublesome because it will be difficult to ascertain when milestones can be reached.

#### 5. Budget (the “How Much?”)

“Budget,” in this section, is not limited to money; it also refers to how much your various activities will cost in terms of number of volunteers, number of hours of their time, and other resources (i.e., buildings and equipment) Creating your budget can also be painful and tedious, but it is necessary. If you are meticulous in preparing it, you can avoid unpleasant surprises later on, making for better work. This section is of course also needed for accurate and effective fundraising efforts.

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## 6. Stakeholders and Leaders (the “Who Cares?” and “Who Is in Charge?”)

Who are the stakeholders for this particular task? Who cares and who should care? Who will be affected by the event or activity you are planning? You will want to share your plan with your stakeholders so they can evaluate it and offer input. Full transparency (again, sharing) is key to maintaining trust and efficiency.

In this section, you also need to establish who is responsible for each part of the work effort to be completed. Will there be leaders assigned to specific objectives? If so, you need to include this information. Your volunteers can then consult this information so they will know right where to go to if they require direction or assistance.

We reiterate: this is a very important section. **There is nothing better than full transparency of responsibility to generate great peer management.**

## 7. Outcome Assessment (The “When Are We Done?” and “How Well Did We Do?”)

Before we even begin our tasks, we need to establish how we will know when they are complete and how we will assess them in terms of the objectives we originally set out. You should use qualitative and/or quantitative metrics. If we fail to define in advance how we will wrap up and assess the task, we may never be finished! We may never know when we are done.

**Table 15—Briefs, Briefly:**

- *Introduction (the “What?”)*
- *Purpose (the “Why?”)*
- *Action Steps (the “How?”)*
- *Schedule (the “When?”)*
- *Budget (the “How Much?”)*
- *Stakeholders and Leaders (the “Who Cares?” and “Who Is In Charge?”)*
- *Outcome Assessment (the “When Are We Done?” and “How Did We Do?”)*

## 5.2 Scheduling

Scheduling work effort and deliverables is an extremely important task. This can be done well once you have those briefs in place and your resources accounted for. It is important to define in advance what constitutes a project's completion, and all volunteers need to know what the time frame is for accomplishing the activities, goals and objectives. Without due dates that are based on a tightly defined and accurate schedule that has milestones along the way, a team's tasks can stretch on infinitely. Schedules can be driven by stakeholders, clients, the "Big Boss," middle managers and the folks on the ground. Many people contribute to a schedule's development and anyone inside and out may be the one to create or define it. An important part of scheduling is that the creator of the schedule for a particular activity must consult those who will actually do the work to add some sense of reality and application to the event. They must also consult with the customer or client to make sure deliverable expectations are being met. Our mantra should be to deliver **"Great Products or Services on Time and on Budget."**

***Scheduling allows your organization to maximize the potential of the organization's resources, to produce the best results and services. It can also provide a major boost to team morale as tasks move ahead efficiently, smoothly, and on time.***

Accurate scheduling takes into account all work efforts, all resources, and all volunteers. It also requires a manager to continually monitor and assess how the tasks are proceeding. We all know that unexpected events happen and can interfere with our careful planning. So, it is best to integrate some cushion or slack time into your schedule.

Scheduling allows your organization to maximize the potential of the organization's resources, produce the best results and services, and it can provide a major boost to team morale as folks know what to do when. Instead of spending time trying to figure out what to do, the team can arrive with a clear plan, ready to tackle the day's clearly defined tasks.

All of this also requires that we know what we are not going to do. What steps can we skip? What are we going to skip altogether? What is outside the scope of the effort? As a volunteer manager, you will need to address these questions. Decide, with input, what the priorities will be and who will work on what to maximize output.

Once you have created your schedule, stick to it. If you need to change it because of unforeseen circumstances, then do so, but make sure that you do not change it too often, as your volunteers will get confused and frustrated. For example, some projects change a lot, but that does not mean we should change the schedule every time they do so. Confusion will be the result. Choose a time period, weekly, or monthly, for example, to make adjustments so that all volunteers know that the world changes every other Wednesday. This will keep folks more settled with change.

**Good scheduling requires active balancing. Make sure to establish clear checkpoints for your volunteers so they can see their progress.** Regularly scheduled meetings—even if they are very brief—will allow you and your team to provide updates on their specific tasks and share the small and large successes along the way. Such meetings are also useful for comparing progress with the schedule, establishing and communicating priorities, and discussing resource needs. Meetings are also important for personally keeping in touch with your volunteers. They need to know that the managers and their teammates are engaged and that they care about success.

***Good scheduling requires active balancing. Make sure to establish clear checkpoints for your volunteers so they can see their progress.***

Here is one last thought about scheduling, what we will call “caring delay.”

We can define this perhaps as unselfishly helping another, or thoughtfully changing priorities due to an illness, unforeseen circumstances, or simply another’s needs. You should give thought to how you balance your organization’s objectives and how this will affect your volunteers. At times, we must just slow the whole ship down. Delay your work efforts when necessary with thought and purpose to regroup, catch a breath, give a reward, or maybe to simply say thank you to all and have a “micro-celebration.”



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### 5.3 Paying Attention to the Big and Small

We cannot reiterate this enough—we need to pay attention to all things, the big and small, both the apparent and the not-so-apparent. This is crucial for your organization’s planning. We have to take responsibility for ourselves, our teams, and our organizations if we wish to function efficiently and succeed. Sometimes this means taking stock and reinventing ourselves. If we avoid this chore, we can end up miserable and unorganized.

One of the ways we can continually improve is by committing to learning all we can know about ourselves and our organizations. If you can “go broad and go deep,” you will be on your way to being very well developed. Pay attention to all of the changes around you, so that you can morph when necessary to ensure the volunteer organization’s move to excellence and sustainability.

### 5.4 Choosing to Lead and Manage

If you are going to be an effective leader / manager in your organization, you should choose to lead and manage every day at every moment. In other words, do your best to be your best. Be proactive about your leadership. Be proactive about your management. Be proactive about your participation on a team. **Build your own sense of purpose and responsibility.** Take action to better yourself and to better your organization. Remember, too, that we cannot take action every day without rest-oration another time.

Make sure to remove unnecessary burdens from your volunteers and from each other so that you can all concentrate on your tasks and feel accomplished. With fewer worries, you will be able to accomplish more and be more efficient.

**Take action to better yourself and your organization each and every day.**

Stay on top of your to-do list. **Turn on your “A Game.”** All volunteers are looking for an example to follow. Be a good peer mentor. If it is your role to manage, let it be your deliberate choice to make sure you are that good example.

### 5.5 Leading Balanced Lives (Personal Planning)

In closing this chapter let us to move to balance. There is no shortage of written material on leading a healthy physical and mental lifestyle. Most of the chatter is about finding balance. We all must make sure that we not overextend ourselves into our volunteer passion. Many people become more overworked than they were in the paid work place. It is important to find some restoration, **it is important to maintain all of our needs.**

As mentioned above, we all need to make sure we restore. We need to ensure that we enable restoration of ourselves, our teams, our organizations, and our families. We must choose to take time for all, for if we do not our world will become unbalanced and our contributions in it will suffer. As volunteer managers we must be vigilant in our assignment of tasks, and we must be vigilant in watching over others. While we do not manage the “rest of” our volunteers’ lives, we must manage the time they spend with us helping to provide a healthy balance of activity.

**We need to take time or time will take us!**

In summary then, while we know you get this from many different directions and in many different formats, we offer a couple of paradigms to take note of. The first, given to us by an old Irish mentor of Karl’s, suggests that balance can be found by our personal need to do something with our hands, with our minds, and with our hearts. We need to be physical (exercise, eat well, sleep well). We need to use our minds and be intellectual / rational / thinking people to satisfy our need for progress and the absolute (perhaps we can read this as learning, creating project briefs, and the “sure thing”). And he argues that we need to be passionate, spiritual, and curious of the unknown as we are not, nor never will be fully rational meta-men and women no matter how hard we try, or no matter how our society attempts to box us into the over-extended rational existence.

We need to choose to pay attention to this balance; we need to plan these things into our lives. We need to take time, or time will take us. As individuals, we need to make personal choices to find our balance, make time for the important, and not burn out. As organizations (and managers) we must make sure our people have time to have a whole life. We can push too hard at times, which may help in the short run, but over the long haul it will not lead to sustainability. Let us finish with another quick acronym that we all need to be reminded of daily: HALT.

**HALT! Never get too:**

- Hungry
- Angry
- Lonely
- Tired

In planning for all things, not just the work effort, we need never to **HALT**: never to get too **Hungry** (eat healthy, also stay humble and do not get selfish); never to get too **Angry** (i.e. stressed, jealous, or bound up); never to get too **Lonely** (build those good teams and organizations and stay close to your teammates, friends, and family); and never get too **Tired** (get plenty of rest, restore your body and mind). Keep life interesting to stave off boredom, complacency, and apathy. With these thoughts, get energized volunteers and volunteer managers, and stay energized. Your organization and the people you serve will thank you many times over.

<b>Table 16—Key Points to Remember</b>
<ul style="list-style-type: none"> <li>• <i>Planning for success will help you achieve success.</i></li> <li>• <i>Develop a clearly organized system to keep track of tasks and projects.</i></li> <li>• <i>Use briefs to plan, document, communicate, and increase efficiency.</i></li> <li>• <i>Schedule work effort and deliverables.</i></li> <li>• <i>Pay attention to all of the details, big and small.</i></li> <li>• <i>Choose to lead and manage.</i></li> <li>• <i>Lead a balanced life.</i></li> <li>• <i>Remember never to HALT.</i></li> </ul>

## 6 Getting and Staying Organized

*When we know what to do, when to do it, and why we do it, great work often follows.*

Now that we have discussed how to plan your volunteer organization's work efforts, tasks, activities and events, we will turn to how you can get and stay organized. Rather than focus on the mundane tasks of organization (creating a calendar, maintaining excellent record-keeping), in this chapter, we will focus on the human elements of getting and staying organized. In particular, we will address managing yourself, managing other volunteers, supporting your leaders, and delivering great products and services on time and on budget.

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Management is difficult, even more so today than it was in the past, given that we are working with knowledge workers coming to us from a wide breadth of generations and cultures. While some may say that volunteer organizations are filled with sameness, we will argue that the mix of people is becoming increasingly more complex in this next generation and at a minimum we often have multiple generations working alongside one another. We have the young seeking experiences and the old often searching for something to do and some purpose in their later years.

Given these complexities it is essential that you develop solid management skills and apply them to your organization's activities in order to maximize your input and output. We might argue that volunteering and certainly volunteer management can require a high degree of "emotional intelligence." Having emotional intelligence requires that we grow up, be mature, stay focused on the good things with one another, deliver a great product and service, that we help as needed, and be solution providers, not whiners or drains. It's that simple, or perhaps that complex. Growing up is hard to do. Undertake the bulk of what we chat about in this text personally and you will be well on your way to having a positive experience and successful in your volunteer activities.

**Table 17—Chapter Overview**

- *Managing Yourself*
- *Managing Your Teammates*
- *Supporting Your Managers and Managing Up*
- *Delivering Good Products and/or Service*

In addition, we wish to highlight one particular item in the suite of emotionally intelligent traits that folks struggle with. At times, following these guidelines that we lay out below may lead to some loneliness, as you may often feel you are the only one making the tough decisions. However, you should not let this discourage you, nor should you let loneliness consume you. Someone must make the necessary management and personal decisions; you will find the rewards are well worth the effort. Dig a little deeper and find the courage to lead and manage. Be the volunteer others follow and wish to emulate.

## 6.1 Managing Yourself

Managing yourself begins with knowing yourself. What are your strengths and weaknesses? Do you monitor your emotional state? Are you disciplined and prepared in all that you do? Do you understand what you bring to your organization in terms of skills and resources (including time and energy)? If you do not know the answers to these questions, you need to spend some time assessing yourself. It may be helpful to sit down and write a list of your qualities and of the kinds of things you feel most comfortable doing within your organization. (Read chapter 2 again). Write down your personal goals as well. Being aware of yourself and actively managing yourself will help you to succeed in your volunteering and will contribute to creating a positive environment.

**Table 18—Managing Yourself**

1. *Remain Positive*
2. *Make Decisions*
3. *Your Physical Needs*
4. *Professional Development*
5. *Confidence*
6. *Managing Loneliness*

Your personal preparation will breed confidence in yourself and others and help keep you all on task and moving forward. And, recall, as you are planning that self-management, make sure you leave the time necessary to keep the balance in your life. We most importantly do not want to move from one hurried-up, work-for-pay scenario to a hurried-up and stressful volunteer activity. This defeats the purpose of all of this planning, does it not? We want you all to have the time, focus, and plenty of stamina to make purposeful contributions over the long term.

### 6.1.1 Remain Positive

No one likes a whiner. Yet, how many of us find ourselves griping about something every day? Whining, gossiping, and backstabbing lead to very negative environments. **Negative environments lead to low morale.** Low morale means volunteers will get less accomplished. **When we whine and gossip we are being weak.** Volunteer teams need strong leadership and good management, and thus, you as a volunteer manager and/or as a volunteer team member must foster a positive environment in which everyone can thrive.

Whenever we are around others, we will be judged and we will judge others (although we constantly need to work on this malady). Those in a leadership role are watched particularly closely. It is inevitable. Our words carry weight and have effects unimagined when spoken. Everyone needs to vent sometimes. We need to remember, though, that when problems arise or situations are bothersome, we need to address and change them rather than flounder in negative words. When we do make mistakes or say things we should not say—we are human, after all—we need to quickly make amends and move on. Maintaining a positive environment will ensure that your organization will stay on schedule in meeting its goals and deadlines. Help keep your organization positive, no matter where in that organization your place may be!

### 6.1.2 Make Decisions

It is important to stop and assess where our organizations are, where we want to be, and where we do not want to be, before we move forward. However, it is also necessary to make decisions without getting bogged down in analysis. This is a responsibility that you cannot ignore if

***While it is in our human nature to want to remain in our comfort zone, it also becomes difficult to make any real progress.***

you want your organization to thrive. At times, you will need to make quick decisions based on very little information. Sometimes, you will need to make these decisions on your own, and sometimes you will need to push your leaders and your teammates to contribute to the decision-making process. Failure to do so will result in stasis, which in turn will result in things being done to you rather than you proactively making choices to move forward. While it is in our human nature to want to remain in our comfort zone, it also becomes difficult to make any real progress while holding tight to stasis.

### 6.1.3 Your Physical Needs

Do not forget to take care of your body either! We know—we have stated this a half a dozen times thus far and probably will say it another few times prior to the end of this book. It's just so important—the organization needs you healthy so you can run harder day in and day out, and produce more with a better attitude.

You need to make sure you are eating healthy foods, sleeping well, and exercising vigorously. How you care for yourself today provides you with the energy to complete the tasks you need to do and also affects what your physical and emotional state will be 20 years from now. There is no way you can bring your “A” game to the table if you are not at some level of healthy physical performance. We all have our idiosyncrasies and issues, but the point is to keep at it. Keep in mind always that your physical and mental health impacts the quality and amount of work you can give.

### 6.1.4 Professional Development

One of the best ways you can make sure you are always making progress is by purposefully learning something every day. Read—a lot. You do not need to read 5-inch thick biographical novels every other month.

***Make a plan for your own strategic development.  
Get organized to grow intellectually.***

Magazine, newspaper and Internet articles are abundant, free, and informative. In addition, ask other people you admire to teach you what they know. Watch and learn from them. **Make a plan for your own strategic development. Get organized to grow intellectually.** Help others to learn, too. Athletes train by lifting weights and doing other physical conditioning—you need to do the same thing with your mind, and encourage your fellow volunteers to do likewise. Your performance, as individuals and as a team, will be all the better for it. To be an expert in one area requires that you are proficient in many.

### 6.1.5 Confidence

We all need confidence, but at times we all have our fears and doubts. We must learn to manage these fears and to avoid being ruled by them. There is no reason not to feel confident if we have trained. Train like a “Pro”-fessional and you will soon be spreading that confidence around by empowering yourself and your teammates to make the right decisions about the work and each other.

So, one might ask, just how do we build that confidence we all need? Prepare and plan—take the actions described throughout this text and you will be ready to deliver results. Write that work plan, continually educate yourself, practice leadership, stay healthy and alert, accept some nervousness and forge ahead. People do not judge nervousness harshly; some nervousness is natural in all new things, new management, and especially in new leadership. It is OK. Just do not compensate for that nervousness by being loud and overbearing. When a dog growls it is scared—do not be the dog. Each time you face down some insecurity you will get a bit stronger and bit more confident. And, you need to do as well as think. We cannot think through our fears. We learn completely when we have taken some action while setting aside those doubts and fears.

#### 6.1.6 Managing Loneliness

We have all experienced being lonely in a crowd. We all know what loneliness feels like. It can be quite tiring. As a manager in your organization, you may very well experience your share of loneliness. In fact, you might experience a lot of it as decisions are made with poor budgets and resource inadequacies. You might also find yourself alone on a team at times, being the only one arguing a specific point of action or some level of integrity or ethics—especially when the work and the relationships are not going so well.

And, managerially speaking, there is never really enough time in the day to share all of the responsibilities and to engage in group hugs to vent and/or make decisions. Someone has got to make the decisions and the tough calls; someone has to stand up straight, knowing that not everyone will agree with him or her. Leaders do not pity themselves in times of solitude. Your fellow volunteers do not need to know that you are having a bad day. **We must resist the spreading of our uneasiness and loneliness on to others in our organizations.** We must be confident and strong, and we must learn how to make decisions in isolation after gathering the facts. Prepare in all things, and be aware of the big and small and you will be ready to take this head on.


Being a leader and a manager is hard. Having the lone team view on some particularly sensitive issue is hard. We must learn that it is OK to stand alone, to make some decisions in isolation. In fact, we should most always state our opinions, humbly. We do not need to be loud or fussy to be heard. But we should learn to speak up, for often others have the same thoughts and concerns and do not have the courage to speak up. We should be deliberate and calm in our voice. However, if we truly believe in something we should be willing to be let go, removed from the team, or fired. This can be done softly. It does not have to be messy. In fact, everyone has been in this position at some time or another, but has not spoken. This should be your only true regret, the regret of silence. Not speaking up with patience and humility can lead to blunders. A healthy team will hear you, explain, and move on in one direction or another. And if you do not “get your own way” and you sincerely believe that it is the only way—well then you may need to find another team. It is really that simple. You can attempt an end run around a direct report, but know that if you are not successful you will probably be down the road anyway.

***We must resist the temptation to spread our uneasiness and loneliness onto others in our organizations.***

Managers, as we have accepted our position we have accepted some isolation. We are no longer on the line with the rest of the crew. We might not get that invite to play pool on a Friday night. That is OK. We must find others in similar positions, and often in other organizations to hang out with. In fact, we should do this anyway, even if our team has us out with them. We need to have a group of peers to share with who face similar issues.

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All that said it truly is nice to have a person or two in the organization that you can trust. Thus, cultivate those relationships. Find a mentor, find a mentee—both play critical roles for our own health. (We learn, and we teach, and as we teach we learn more.) It is also important to have friends and mentors in other realms of our lives that we can talk to and use as sounding boards. Friends are good for our health—get some. Folks can be real poor at maintaining relationships so you be the one that reaches out. So be it—people need help in these matters.

The bottom line, though, is that your commitment to making decisions efficiently will keep your organization running smoothly. Learn to make the decisions you need to make, alone if need be, and move on. And, as stated above—no whining, it's degrading.

## 6.2 Managing Your Teammates

When you are managing other team members in your organization, you need to make decisions quickly while simultaneously being encouraging and protective of your volunteers' needs (such as their time). Your volunteers need to stay focused and must be confident that what they are doing today is useful to the whole and purposeful to them. In short, being a good teammate means being a good human being and friend at times. Becoming a good teammate does not require friendship, but it can be nice. What is required at the core is trust and respect—covered in other parts of this text. Here are a few things you can do, right away, to be that good teammate.

**Table 19—Managing Your Teammates**

- *Be a Coach*
- *Find Balance*

### 6.2.1 Be a Coach

All volunteer organizations are made up of a series of formal or informal teams. And, as it turns out, teams often need coaching. This is not optional. **People require continuous care via monitoring, touching, motivating, and engaging, along with gratitude (as deserved).** We need to encourage, communicate often, and interact with each other, our teammates, and folks on other teams. As a volunteer manager, you need to let your volunteers know that you know what they are capable of and what you expect them to be capable of. You must show them that you know them, you care, and you want them to succeed. You must eliminate barriers that might block progress, and then coach your team to a “victory” at the finish line.

***People require continuous care via monitoring, touching, motivating, and engaging, along with a considerable amount of gratitude (as deserved).***

This all requires considerable attentiveness, compassion, and empathy on your part. Taking the time to do these things, though, will result in a greater success rate for your organization's activities.



### 6.2.2 Find Balance

At times, your organization's activities may require great effort and time from your volunteers. It is essential to remember that such effort and time are sometimes necessary, but we must always keep in mind the importance of balance in our lives, too. We all know this, rationally, but too often, we ignore this need and become overwhelmed. Many of your volunteers have careers that require much of their time and energy before their volunteering work even begins. All of your volunteers have families, loved ones, or friends somewhere that need some attention. Many have hobbies. All will need rest. You need to ensure that your people are not spending so much time on their volunteering activities that they neglect other essential areas of their lives.

Make it clear to the team that balance is an important goal. Insist (angrily if necessary) that they rest. Insist they skip the late nights at times and go home. They need the rest. Get them out of the office. Take them to lunch. Go on a fun field trip. Perhaps tie it to an upcoming project or an important donor's point of interest. We once had a small hardworking group that on an occasional Friday afternoon we would have to force a break by hosting a networked gaming session. We playfully joined in too, but we didn't last as that was not our forte. But it was their world and they had a blast. Essentially we forced fun. Otherwise they were so consumed with their work they would go until they fell over. Falling over is not a good state for the team to be in short or long term. We all need rest, rejuvenation, and some time to interact without the stress of work looming over our heads.



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You need each other and your team to be rested, healthy, efficient, fast, and wise. Make sure that you are being flexible and not assigning too many tasks to your volunteers. Take good people, assign X amount of work, insist on updates, and then let them work outside the lines a bit. We repeat, make your volunteers go home if they are overdoing it. They will perform better when they are rested. Staying will lead to burnout, and then you face losing volunteers.

### 6.3 Supporting Your Managers and Managing Up

When you are dealing with the bosses in your organization, it is sometimes hard to get their attention because they too are often overworked and have many of their own problems to deal with. Senior managers above you in your organization likely have many responsibilities. How can you make their jobs easier? By being supportive. Help your leaders see their way to the right decisions. They cannot know all things

Thus far we have chatted about managing ourselves and managing our employees. Below we chat about managing our deliverables. There is one very crucial piece in all of this missing yet that we need to explore more fully, and that is managing up. Long ago we were taught that a manager was misdirecting effort if (s)he spent more than 20% of their time managing their people. You see the other 80% needs to be spent managing your stakeholders, customers, clients—and your own boss.

Helping the boss see his way to the right decision has always been a very important part of being a good employee. A boss cannot and does not know all things. We need to teach, we need to help, and we need to provide enough information for good decision-making but not so much for confusion. We need to find the balance via a simple approach. We need to bring options to the table; we need to bring solutions to the meeting. We need to try not to be yet another problem for them.

We have learned that if we cannot communicate our issue to the boss in five minutes or less, and preferably two minutes (usually the time it take before an operational type “A” boss seems to interrupt) then we do not understand our problem well enough. It means we have not studied our issue in enough depth to keep the communications quick, the explanation tight, and the solutions apparent. That is not to say we do not go in sometimes and ask for advice. We do; but we also keep that very simple as well. We provide a document and say, “I want your opinion.” We talk for one minute or less and ask “How would you handle that?” We are brief, and we ask for a very specific commentary about a very specific subject so that we can get in and out with a decision or some useful advice.

The frequent, brief, work-only, decision-making, deliverable-orientated visits can help you get noticed in the noise. Help your volunteer boss make the right decisions day in and day out. Help her be successful. The result will be that you are appreciated, you learn, and you may even become the boss someday.

Keep your communications quick, your explanation tight, and your proposed solutions very clear, well thought-out, well planned, and easy to pass on. Manage your boss as she manages you. Help him find the right the path to great work, again and again, on-time and on-budget.

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## 6.4 Delivering Good Products and/or Service

How can you get your organization noticed? Deliver. It's that simple. Deliver a good product or service on-time and on-budget consistently and it will be amazing how much simpler it is to raise (or earn) those much-needed funds. Work on your reputation, your “do what you say you are going to do” attitude. Communicate well and make sure the clients are finding that what you do or make is of high quality.

Your organization must manage many tasks efficiently and productively. Organizations can be complex, messy, and bureaucratic. Be the volunteer, the leader, the manager who always delivers, brings solutions, eliminates headaches, and is pleasant to be around. Do not take on too many things, but close the things you do take on. Be organized and prepared, provide great communication, and deliver great results. The rewards will come. Here are a few topics to keep you thinking about your services and/or products.

**Be a Solution Provider**—This appears to be most software companies' favorite phrase. It makes sense; it tells the customer right off that we are here to help. We have all heard that one should not bring problems to the table, but only solutions. Be the person, be the organization that delivers solutions. Show up with evidence that you have taken the time to think the problem/product/service through and are seeking approval of possible solutions. Provide costs and benefits, pros and cons, and seek a decision that will move you forward. At worst, be asking for guidance or advice as opposed to just asking to be told what to do. And be careful about asking the clients if they want A or B because they may say yes to both, particularly if they solve different problems. Now if those additional tasks come with resources, great, but we find most often that it simply leads to project creep—more work for the same pay. The idea is to push progress, not get more work. So deliver a solution. Deliver thought, a plan, and a closed solution.

**Loud and Visible Delivery**—First, make sure you have positioned your delivery so that all can see it. We know a fellow that always delivers publicly. At the retreat, at the board meeting, at the council, always, always he delivers in front of a crowd. It is always a highly scripted, high-quality, well-done presentation by his people (so as to not look like he is showing off). Deliver more than delivery—deliver a show, an opening, a beta, a final, with cookies and punch and food and liquor. Think Steve Jobs and product launches as the extreme. Do whatever it takes to get you and your people noticed for having delivered a wonderful product or service on time and on budget. Don't be afraid of showing off a little bit, for if folks do not know what you do then how can they bring themselves to pay for it?

This is politics and showmanship at its finest. It can be done with humility, but remember it is show-time, it is delivery time. Take advantage of the fact that you and your folks have done well. The team gets promoted, everyone gets a little more recognition—some new volunteer titles, perhaps—and more budget to do a repeat of that good service for your cause into the next year. It makes sense. It is often needed to survive in a very messy and competitive environment.

**Celebrate Delivery** — Always celebrate, even when we cannot be externally visible we can always celebrate internally. If you can't show off to others you can celebrate within your own domain. Take your own people out to lunch. Perhaps go to your own unit's building and have an office party. Perhaps you can convince the boss's administrative assistant into making sure she is invited. Maybe you know the boss well enough to ask him to do a drive-by since the team has worked so hard and would love some face time. Celebrate loudly, celebrate quietly, but always pause for a moment and take stock in the day and thank your folks for doing good work. A celebration can be as simple as a box of donuts and coffee or as complicated as a glamorous black tie event. Either is good. But something is needed for your people to understand the organization's gratitude and to add to the sense of purpose.

**In Brief:** Create a visible, loud, celebrated delivery in all its forms. Get what you can. Be visible. Take out an advertisement: "We would like to announce the office has just celebrated its 35<sup>th</sup> consecutive delivery without a hitch", or "The 10,000<sup>th</sup> on-line view or query has been received" — "The record-setting one millionth donor dollar was collected this year." Politics, you bet, but educational as well. For if you do not tell the world what your team and groups are doing, then who will? There are others who want your budget. There are others who want your donor's money. Funds are scarce and folks chasing those funds numerous. Be strategic, be smart, and be professional—then celebrate.

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## 6.5 Summary

Staying emotionally engaged and enthused takes some significant energy. Each of us, the volunteer, the volunteer manager, and even the senior team, needs to come into the organization ready and able to contribute to the overall positive force of the environment. We must all continue to develop that emotional intelligence we defined at the onset. Again, we must grow up, become mature, stay focused on each other and the product, help as needed, and be solution providers rather than whiners or drains.

Each of the items in this chapter applies to both the manager and the team member—we are different and we are the same. We each have different responsibilities in the detail, but the same responsibilities in the whole. We must all ensure that our volunteer organization remains firm, healthy, positive, and moving forward to deliver a successful set of products and/or services to people we have chosen to serve. Stay focused, stay civil, and remember why we are all here: to volunteer to do good work and to help others, or other things (the bay, the oysters, the famous old bridge, or the birds) that may not be able to help themselves or itself. Volunteering is a healthy choice.

**Table 20—Key Points to Remember**

- *Manage yourself.*
  - *Make decisions.*
  - *Take care of your body.*
  - *Seek professional development opportunities.*
  - *Build your confidence.*
  - *Manage loneliness.*
- *Manage your teammates.*
  - *People require continuous care.*
  - *Encourage balance.*
- *Support your managers.*
- *Deliver good products.*

## 7 What about the Money?

*“You haven’t talked about anything unless you’ve talked about money.”—Unknown*

The world of fundraising has gotten much more complex over the last several decades because of the increased competition for those funds (there are simply more volunteer (non-profit) organizations), the reduction in the availability of both government and foundation funds, and the somewhat structural (meaning permanent) 2008–09 recession that destroyed a great deal of wealth and also made many others much more cautious of giving and committing longer-term donations. Funds are now harder to acquire and you should understand that an enormous amount of energy is expended in your volunteer organization raising money and selling the cause, the product, or service. This can, and often does, result in an uncertain and, at times, very stressful environment.

Many of us live in a capitalist-like environment. This economic structure is especially relevant to us in that it underpins the acquisition of funds to undertake volunteer-based activities. What does that mean exactly as it pertains to your volunteering? The brief answer is that anyone who is delivering a product or service to one group at no cost must be able to convince others that this product or service is worth paying for with their own or others’ money (personal donations or government and foundation grants).





In contrast, in a centrally planned economy—assuming we are in a perfect world—organizations might all get a chance to be at the “central table” asking for funds for the organization and thus for its services and/or products. They also, most likely, have the means to raise money via personal donations, but this can often be difficult, as these economies often have very high tax rates (i.e., folks are already giving) or may not have very high average family incomes. In all scenarios, worldwide, there are never enough funds to pay for everything that is worth doing. In both forms of economy, free market or centrally planned, the volunteer organization must “sell” its purpose and activities continuously to remain financially sustainable, allowing for the doors to stay open and those services to remain available.

Many people involved in philanthropy—for example, foundations that raise money for colleges, universities, or perhaps art institutes—have come to understand that they must “sell one thing” as they acquire funds for another. This sale might involve reliving memories, providing donors access to the president or an artist, or better seats and access to sporting or gallery events. Organizations also sell “naming rights” to buildings, rooms (and we have even seen bathroom stalls) or provide amenities that cost less than the donation, but that an individual can only get with a specific donation of time, materials, or unrestricted cash.

**Table 21—Chapter Overview**

- *Asking for Money, Making Money*
- *Events and Sales*
- *Philanthropy*
- *Foundation and Government Grants*
- *Finding a Sponsor Match*

Volunteers, we want you to understand a few of the financial issues your group faces every day. Volunteer managers (either paid or volunteer), we want you to know that the money you need to do your work does not come easily. Paying the bills is difficult in most volunteer-based and/or non-profit organizations.

This chapter discusses a variety of ways in which most of your organizations raise money. It is by no means comprehensive. We simply believe that you ought to get a feel for organizational revenue generation activities and consider how you might fit into the equation. Thus, we emphasize in our discussion why and how each volunteer can play such a critical role as an ambassador for the organization. Every other organization and every other person you bump into is a potential donor, buyer, or competitor. We thought it extremely important to take some of the mystery away from fundraising and to empower you with that knowledge.

## 7.1 Asking for Money, Making Money

There are two fundamental ways in which any organization acquires the resources needed to operate. We can ask others to give up their money (or labor) or we can earn money (from our products, perhaps). We consider grants as part of the second category, as most often they come with very specific expectations and regulations. Personally, we have found over the years that it can be far easier to make money than it is to ask for it. Folks that have earned it once already seem to keep it awfully close to their chest as they move forward in life. In any event, all of our volunteer organizations require resources that get expended via an annual budget and through various capital expenditures.

When you ask for funds from individuals, they have, for the most part, already earned it once. And, given that they have earned their wealth, it is not an easy task getting them to part with it and donate it to your organization to spend on your goals and objectives. Along the same lines, it can be hard to get individuals to part with their labor, to volunteer. **To be successful you must turn your goals and objectives into the donor's goals and objectives—this is called this donor-centered fundraising.** This can be a very difficult task as each donor may have entirely different needs and objectives. We must find a place where we all can benefit. We understand that you have obviously given this some thought, too, as you, the volunteer, are reading this chapter of this book.

***To be successful you must turn your goals and objectives into the donor's goals and objectives. This is called donor-centered fundraising.***

When your volunteer organization earns money successfully the free market economy has decided that your organization has something it wants to buy. There is a fair exchange and you profit (or have a surplus) from that product or a service (primarily your labor). In turn then, you take those profits (surpluses) and return them to those you serve in the form of additional services or goods. Thus, you earn money only to give it away in some other fashion.

Most non-profit volunteer-based organizations actually do all of the above. Successful organizations (profit and non-profit) like to diversify their revenue portfolios. By diversifying sources of revenue an organization is then not dependent on just one source (perhaps donor), one event, or one product to make budget. Economies and markets are fickle, and have become more volatile, and to be dependent on just one source of funds is risky behavior. Despite this risk some organizations are so successful at event management that they often have an annual “something” that pays a large portion of the annual operating costs. The “what ifs” of change are sometimes completely ignored and this over-dependence on a singular source of funds puts at great risk what these organizations value the most: their cause and their volunteer goods and services.

If you are a new volunteer or volunteer manager, we suggest that you **brainstorm new and diverse ways to obtain resources constantly**—even if you only change the fundraising portfolio occasionally. Stay fresh and stay focused. Any day can be the day that your organization falls out of favor or some external event (another global recession) changes the meal plan and thus breaks down the financial stability of the organization you are a part of. We suggest you stay vigilant and do everything you can to be ready for that day by diversifying your sources of revenue.

The rest of this chapter will discuss the four major areas of fundraising activity: **events & sales (products), philanthropy (donations), foundation grants, and government agencies (also primarily grants).**

## 7.2 Events and Sales

A very well-organized event can bring great attention to your organization, publicity that is often hard to buy. Events can be of many sizes: the one that supports you all year long or the event that gives you just enough of the resources you need to provide the flexibility to cover items no one else wants to pay for. Examine the portfolio of activities your organization undertakes to get a better understanding of how you operate and if and how these events contribute significantly to the bottom line and good will.

Many groups seem to make events work year in and year out despite a comedy of errors. Your organization may do this quite well (or not). Regardless, ask to be a part of it, see that it is organized, and make sure the food is good. **No matter what the program, participants always remember the food and drink, the company of each other, the purpose, and then perhaps any content of programmatic activities.** Try to remember this hierarchy. It will serve you well.

***A very well-organized event can bring great attention to your organization, publicity that is often hard to buy.***

At one point in our careers we had an activity where we actually cleared \$25,000. This may appear to be small change given that we had an average annual average budget of about a \$1.5M. But these dollars were important to us, as you should know that it can be very difficult to obtain that flexible or unrestricted dollar.

What do we mean by unrestricted dollar? Line item donations or grants mean that the sponsor (the one who gave us the money) stipulated that the funds could only be used to support the line items the sponsor approved. But we also had to buy pencils, computers, and a trip or two that no one wanted to pay for. And we gave small amounts of money to others. This unrestricted \$25,000 went a long way during the course of the year, helping us be a better organization and have paper to write on. The point is, whether small or large, each event can be a very important activity for an organization. If your organization has no outside events, perhaps you should consider developing one that contributes to the bottom line (and good will), thereby adding some fiscal flexibility into the mix.

Other examples of events might be the booths at the fairs where we sell food or products; annual conferences (should be mostly money-makers); the annual silent auction gala with very expensive tickets, giving the donor the right to buy a piece of art or some other coveted item. There are concerts, golf tournaments, sponsored cruises, and so many other one-offs that help raise awareness and contribute to sustainability. All of these require careful planning and follow-through. **Do not do these events unless you are going to do them well.** Find the person in your volunteer organization that pays extreme attention to detail. These folks can be great event planners, and can also often execute well. Sometimes the planner and the executor are not the same person. Regardless, know who you are and know whom you manage. Then put the round pegs in the round holes and get organized, execute, and deliver a great event.

**Let us tell you a brief story...**

*We once went to a signature cultural event that required that we donate a certain amount of money for the right to purchase (read spend more money) tickets for this event. It was a fantastic cultural experience and we were treated famously. However, one thing stood out in our memory above the rest—the food.*

*At the pre-event cocktail party the food was good, but not \$500 good. Bad form! You cannot charge large sums of money and deliver mediocre food. Event planners spend the money on the food and charge even more, because it works to charge high prices when the food is a one-of-a-kind or from a long way away (lobster and fresh pineapple for Fairbanks, Alaska, for example). Speak up, when you see someone minimizing the event food. For better or worse, we always remember the food. Deliver the great food with a fine presentation—and in very large quantities. In purely economic terms, folks need to be able to eat until the enjoyment (marginal utility) of that next “great” shrimp is zero.*

Some are quite good at encouraging donations for the right to obtain entry to high demand events or high demand locations at specific events. To us, these forced donations do not feel quite right. One is required to donate X, for the right to spend Y, to get tickets to event Z, where you are also often introduced to other fundraisers (also called development officers) A, B, and C searching for even more of the participants' cash. Personally, we think you might consider simply charging higher prices period, for which a small portion of the price is the ticket cost, or in other terms, the cost for goods. Yes, we know we are splitting hairs here and that this just might be a fine economic/pricing line that we are over-worrying. The end result of the scenario above, however, can be the same out-of-pocket costs to the donor, with both just as well off. Yes it does require that you do a little more accounting—but so be it—you are the one soliciting funds. We think the forced donation leaves folks unsettled—especially for those with little tax to write off. You might reconsider this strategy—and simply have high prices for high-demand events. People understand this. Tread lightly and think through these decisions. Examine who your primary donor base is and sit in this context.

Volunteers, we ask that you get into high-end service mode at these events. Don't talk too much. This is a common malady of inexperienced salespeople. Also see that others' needs are met. It is not about you, it is about the money you need to perform your organization's activities and the donor's willingness to participate. And, to beat this up—do not have the “Food Problem.” Food is cheap compared to the donor relationship you cultivate. Organizations should see that those who donate more get extra drink tickets, food they wouldn't normally eat, and access to the “stars.” Food and atmosphere go a long way in helping the philanthropic sale you will make at the event or perhaps on another, more private day.

**Diversify events, sources of funds, and timing.**

In summary, volunteers, we want you to know how important events and sales are to your organization, even if the bulk of the annual budget comes from some other source. Volunteer managers please change it up some if you are entirely dependent on one (or just a few) events and/or products for the bulk of your budget. Diversify events, sources of funds, and timing. If spring flings fall out of favor you also have the fall festival. We know that this analysis is somewhat brief in discussion, but hope that it conveys how important hosting well-planned events are to your fundraising efforts.

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### 7.3 Philanthropy

What is philanthropy?

Wikipedia describes it thus:

“In the twentieth century the long humanistic tradition and culture of philanthropy as classically conceived, was superseded by social scientific terminology. Today ‘philanthropy’ is conventionally defined as ‘private initiatives, for public good, focusing on quality of life,’ thus combining the social scientific aspect developed in the 20th century with the original humanistic tradition, serving to contrast philanthropy with *business* (private initiatives for private good, focusing on material prosperity) and *government* (public initiatives for public good, focusing on law and order). Instances of *philanthropy* commonly overlap with instances of *charity*, though not all charity is philanthropy, or vice versa. The difference commonly cited is that charity relieves the pains of social problems, whereas philanthropy attempts to solve those problems at their root causes, the difference between giving a hungry man a fish, and teaching him how to fish for himself. A person who practices philanthropy is called a philanthropist” (“Philanthropy,” n.d.).

**We will define a pure philanthropist as someone, or some organization, that “gives” our organization primarily unrestricted funds to operate with and invest.**

Let’s break this down some for our discussion here. **We will define a pure philanthropist as someone, or some organization that “gives” our organization primarily unrestricted funds to operate and invest.** The key here is to give money to us vs. requiring some labor by us or activity we undertake to earn funds. Do not confuse the above with a grant, which often stipulates some work or activity, from a purely philanthropic donation. We will distinguish one from the other by whether there is some work for pay. A “true” or “pure” philanthropist (our term) will give to your organization and allow you to use those funds as you best see fit.

Now, the problem: there are so few “true” or “pure” philanthropists anymore. **Very few people or organizations (even ones that claim to be philanthropic) actually donate to organizations without some grant-like line-item stipulation on how those funds are to be used.** Our point is that those who donate money today often contractualize the philanthropic activity by defining exactly what they are buying. Because of this your organization must have something to sell them.

Philanthropists are buying prestige, activity participation, good will, and personal satisfaction often tied with some required engagement by the organization or organization’s representatives. They could be buying the naming rights of a building or event, or perhaps the right to be associated with the cause (or the face of it) and/or some celebrity. The fact remains that almost all donations come with strings attached today. Your organization must work extremely hard at cultivating these donors, maintaining these relationships, and providing to them the services and attention that they have purchased.



Thus, philanthropic activity has become an economic market-like exchange. Again then, **you must have something very specific to sell these people.** And, your relationship to them and to all involved is under a microscope, so behave accordingly. **It is not about you and often not about your cause—it is about the donor.**

This can become exhausting because the donor's needs are growing and the donors have increasingly micromanaged those donations via lengthy contracts. So, not only do you volunteer for the services your organization believes are important, it appears you are all also volunteering for what the donor thinks is important and thus, volunteering the time that it takes to cultivate these relationships.

***It is not about you and often not about your cause—it is about the donor.***

Know these drivers. **Volunteers learn why you do what you do for philanthropist X as well as why you do what you do for your organization.** Get to know the people and the philanthropic organizations that give. Your leaders will spend a considerable amount of time with these people. Understand this, especially when you are wondering why the boss is never around. ]The good ones are often out raising money and working on the relationships and implied contracts from these types of donors. It is very hard and exhausting work. These donors have often earned their money and it can be quite a bit more difficult to get them to part with it for your cause. Show that you care about what you do, about what they do, and about how they can help the greater good by helping you.

## 7.4 Foundation and Government Grants

Foundations and governments award billions of dollars in grants and contracts each year.

These grants and contracts cover a wide spectrum of causes, from housing and urban development, homeland security, and feeding the poor around the world to a variety of research endeavors, civil engineering structural tests, and education. There very well may be a granting agency or foundation that pays for the bulk of your organization's activities. **The first thing you should do as a new volunteer is to read the annual report. This will help you better learn where your sources of funds are derived to better serve the people and activities with which your organization aligns.** Volunteer managers, you, too, need to read the annual reports and any other summary reports that may have been written for your particular sponsors. You all need to know better who your sponsors are and how their funds are spent. Follow the money and you will follow the dependencies, relationships, and your products.

***Foundations and governments award billions of dollars in grants and contracts each year.***

Grants often seem like a mystery to many people, while to others they are simply a set of rules and guidelines that need to be addressed to request funds. Most applicants fail at obtaining grants because the competition is so stiff. There are always more requests than there is money available and these days there are many more “good” requests than money available. But many managers with fantastic ideas also do not take the time to develop the relationships necessary with agency and foundation project officers to get a successful grant off the ground. In addition, the same grant writers do not read the rules in a solicitation nor answer the questions put in front of them to submit a successful proposal.

**A Grant Preparation (Bad) Example...**

*As we were writing this chapter we chatted with one group of people who was tasked with finishing up the organizational side of a very significant \$2,000,000 proposal written by another group of people in the same organization. The first group left the second group just a day to finish up and did not follow the rules in the funding solicitation very well. So those in the second group, who were not experts in the content areas, had to rush (probably resulting in mistakes) and reduce that proposal from 50 to 35 pages. This happens far too often in far too many organizations. What chance did this proposal have? We suspect that a lot of people spent a lot of time working for what will turn out to be a lot of nothing. This was a large undertaking and was very important to the organization. If you are going to participate in the grants process, then take the time to write a good proposal that follows the solicitation—RFP (Request for Proposal) process to the letter. Pay attention, folks—it is not rocket science to follow the solicitation guidelines—answer the questions they ask!*



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**They do not read and respond well because they do not pay attention to what the sponsor wants to buy, they do not think many of the questions are important, and they are often too self-absorbed in their own purpose or cause.** Volunteer organizations (and actually many, many other organizations) do not take the time to write proposals well. Proposals take enormous time. It is very hard to write a good proposal, and even harder to write a short, good proposal.

We once led an organization in which the smartest people in the room were rarely successful at obtaining grants. They did great cutting-edge work, bringing us into the 21<sup>st</sup> century, but didn't bother enough with what others thought and wanted to buy, at least not enough to attempt to get their own bills paid. However, there were others in the group that did not have the IQ of our "thinkers" (including us) but who were very successful at winning grant money for us and them. We did not think we were the experts—we knew we were not—so we were quite careful in how we approached all proposal writing. We read the rules and answered the questions. We did our homework and it showed in our proposals that we could deliver a quality product on time and on budget. We won many more times above our pay grades.

***Be the no-headache grantee. Take some extra time to cultivate a real and positive relationship with your project(s) officer.***

In addition, granting agencies and foundations have what are called project officers. These are the people that look after the contracts and the grants that have been given to you. While we may believe the big foundation or big government gave us these funds, that is generally not the case. A few reviewers and a project officer most likely awarded the funds to us within the confines of the agency's rules. And, these project officers are then the individuals that can make or break a successful work effort. In addition, project officers are often overworked (too many projects to look after) and underpaid, or paid less than the people actually receiving the funds, leaving them a bit unsettled.

Project officers can be the key to your success. As we mentioned, these are often very busy people. They often have more projects to look after than they have the time to do so. So do the right thing. **Be the no-headache grantee. Take some extra time to cultivate the relationship with your project(s) officer.** On the day a visit is planned, work extra hard to see that all is in order. It is possible you will hear gossip about Project Officer So-and-So being a grind, but pay no mind. These are the folks who manage your money and who manage your ability to obtain more funds at some date into the future.

These relationships are critical, so be on your volunteering best day. Volunteer managers, please pay attention as this is so important. Paying the bills is hard. Achieving financial sustainability is very hard. **Know that in reality people give money to other people, they do not give money to entities.**

Finally, one last task that is often the easiest, but that so many fall down on: be the gold star student (grantee). Be the awardee that communicates well, turns in reports on time, and is a no-hassle partner. It takes time and effort to see that the sponsor is well taken care of, but too often we pay too much attention to our little world, our volunteer work, when we should be paying more attention to the relationships with our sponsors. It's all about the people, people—just as much so as philanthropy.

## 7.5 Finding a Sponsor Match

In this section, we offer you a few last points about grantor (the person giving you the money) relationships and finding your foundation and/or (government) agency match.

**The first thing for you to do is to call the person in charge before you even begin to write a grant.**

Introduce yourself and chat about your organization. Maybe this person only funds people from Ohio. Maybe you find out that you were both born in the same town in Ohio. Maybe you both hate Ohio. Both volunteer and volunteer manager, you just do not know these things

***The first thing for you to do is to call the person in charge before you even begin to write a grant.***

unless you reach out. You do not have to be a swift saleswoman, you just have to be you and talk as best as you can. Most of us are just like each other. We are always a bit nervous at the get-go with a new relationship. No worries. Make the call, be polite, and be humble, ask for 10 minutes, and then do not use up more than 10 minutes. This does not have to be complicated.

**Secondly, tell the directors, project officers, program managers, whomever you can get to chat with what your idea is, and what you have to sell.** See if they like it. See if they think it fits within their funding objectives or content portfolio before you spend an enormous amount of time writing a proposal that a particular group will never fund. You need to find a funding source that funds what your organization undertakes, i.e., what it has for sale. How do you catch fish—find the fish first. Learn what folks want to buy. Too often we just start casting, a poor strategy when we have such limited resources.

**Finally, during this call, after you have gone through the introduction and the process of chatting up your particular work, ask the grantor what they fund in your area of expertise.** At one point in our career we were managing some contract environmental education

***Follow all of the rules for the proposal process, project engagement, and closure. Close well so you win another day.***

on Native American reservations in the Western United States. We had a particular activity and set of classes that we thought would be good to do at a particular location, the agency rep listened, ran off for a moment, and came back with another idea and offered up some funding. The project was still education, still on the reservation, so we made an agreement and obtained a contract. Relationships and face time build trust—it works. Our expertise in this case was used to undertake a different activity because we made ourselves present and listened. Everyone can benefit from these action steps. Develop the needed relationships, tell the world (specifically those that hold the money) what you can and will do for them, then ask the question. For if we do not ask for help securing funds we do not learn if we are fishing in the right pond. Get to yes, great—get to no, move on.

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If you get to know these foundations, government agencies, and the people inside of them well enough, they may even start to come to you. It takes time, a certain commitment, and often travel, but if you want to win, and you want to raise some money there is still no better way than to get to know folks than over a meal. You cannot do that with email. Get out and get to know people. **Also, and very importantly, follow all of the rules for the proposal process, project engagement, and closure.** Then amazingly enough, you all might get a renewal. We love renewals; they take so much less energy to sell (they say—just twenty cents on the dollar) and maintain. Pay attention, volunteers, this is important.

## 7.6 Summary

This chapter has covered several strategies and the ‘volunteer’ behaviors needed to obtain financial support for your volunteer organization. Most volunteers in larger organizations might never bump into this process. There are often people paid to undertake fundraising full time. But, you will be present in this organization, you will represent this organization in all you do, and you may be asked to undertake a particular activity when the champions and philanthropists drop by for an inspection. **Understand just how important this process is and how you can do your part to maintain sustainability.**

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For those of you in smaller organizations, we understand that you may just do it all. You may be president, grant writer, and chief spokesperson. Raising money is hard, but it also can be quite rewarding. The sponsors often want to be engaged, as it's their job to see that the funds they manage go to the right places. You who volunteer for your small grassroots organization could be just the person the project office wants to spend some time with helping you take care of the activities and causes of your organization. They end up helping you, you end up helping them. And, if it happens to be that a particular philanthropist is giving their own money to you, then you can develop that relationship, work on that specific project, give the sponsor some part of it, and help them help themselves feel fulfilled. You just might help them reach their own philanthropic goals and objectives.

Remember, volunteers, you are the face of the organization and may be just the person that makes or breaks an organization's financial sustainability.

**Table 22—Key Points to Remember**

- *Events and sales*
  - *Well-organized events can be great publicity.*
  - *Never skimp on the food and drink. Participants will remember!*
  - *Events can help you acquire the important but elusive flexible dollars.*
- *Philanthropy*
  - *Philanthropists give primarily unrestricted funds to organizations.*
  - *Donations often come with stipulations.*
  - *You must have something to sell donors.*
- *Foundation and Government Grants*
  - *Read your organization's annual report.*
  - *Follow the guidelines when applying for grants.*
  - *Be the no-headache grantee.*
- *Finding a Sponsor Match*
  - *Call the person in charge before you write your proposal.*
  - *Tell the program officers about your idea.*
  - *Ask the grantor what they fund in your area of expertise.*



## 8 The Encore Volunteer

*Once we have passed through our conquering or identity phase we should perhaps consider doing some good service for others and give back.*

This chapter is primarily for volunteers over age 50 with perhaps 20–25+ years of experience in the workplace to bring to the volunteer organization. The encore volunteer is the individual doing something in service after having done something else for a much of their work lives. Much has been written about the “encore” time of life given as so many are living so much longer. Encores want, and often need to find something to occupy time purposely for as much as a decade or two after having finished their primary career.

***The encore volunteer has special place in the volunteer organization, having the benefits of hindsight, experience, and wisdom.***

We feel you have a special place in the “volunteer paradigm” because of the decades of experience and wisdom you can contribute to this encore assignment. You have the benefit of hindsight. You have the advantage of having been there and seen how it all works (or does not), often times repeatedly. You have lived it and can now make better choices and behavior decisions based on what worked, what didn’t, what you liked and disliked about staff and management, and on your ability to know the difference between health and dysfunction. In this chapter we will discuss what we believe are your primary responsibilities and duties to your new organization, especially if you are a new volunteer manager with years of paid service. We will focus in particular on three themes: transition, attitude, and leadership.

**Table 23—Chapter Overview**

- *Transition: the place between paid work and volunteer service.*
- *Attitude: the ability to bring an experienced positive outlook to the mission.*
- *Leadership: your duty to be a senior member of the team.*

Here are several key **principles for the encore volunteer**, some in review, to assess as you read through and digest this important chapter. [However, this chapter is also very much for the person standing beside this encore volunteer or the volunteer manager who has 50+-year-olds as direct reports. These folks have a different world view so pay special attention to their abilities and wisdom and treat them accordingly.]

- **You cannot manage volunteers as you do paid employees** (This point is especially for those of you who managed during your careers.) These people are not volunteering because they are trying to put food on the table. They are present to feel useful and purposeful and if they do not feel this way, they will head down the road rather quickly and find other opportunities.
- **With your age comes responsibility.** People need healthy role models. Whether you are planning the Grand Prix event or digging the ditch, lead by example.
- **Volunteering is not about a second career or a great money-making venture.** There is no shortage of encore phase, money-making second careers disguised as altruistic next steps. There is much written about the “encore” time of our lives, a time when our mortality becomes so much clearer. Some in the marketplace take advantage of how close we are to the end, pitching us an endless array of products, services, and organizations to give back to. Encore volunteering is different, about giving, and you all need to remain aware of this. (Please see the resources section for a suite of additional reading.)
- **That said, if you want to go back to work for pay, then have at it. But if you are looking to leave the “race”, then leave it.** Don’t get stuck in between. Avoid jumping right back into the fray of schedules, deadlines, paychecks, subordinates, bosses, and annual evaluations. Once you take pay, non-profit and for-profit organizations aren’t that much different. You raise revenues, pay bills, sell a product or service folks want to buy, and then repeat. And often many people find that being the paid employee at the cause-based organization may even be more stressful. You have added tight budgets, small staffs, and volunteers to your participation and management responsibilities! Be careful of this trap.

Let us be clear: this chapter is not about encore careers (meaning pay for service). It is about encore staff and management volunteering for those perhaps 50+ who also may have retired early (by choice or global change). This chapter is for those who have had enough of the grand race and want to give back in some fashion.

## 8.1 Transition

It is important to talk about transition, since preparation is often as important as execution. Going from work for pay to work as a volunteer has particular issues. We urge you to take your time transitioning both physically and mentally (even if you are reading this after starting your new volunteering opportunity). We hope that if you have already signed on as a volunteer, you will follow through with these suggestions. There are always adjustments to be made along any journey to ensure optimum effectiveness. In any case, consciously and actively move through a change in mindset. Deliberately prepare and adjust. Avoid going into this new stage of your life before you are ready to commit to change.

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Following the steps below will help you successfully transition into volunteering. Note that the bolded words are all actions that can help you actively move through this process. Transition does not happen all by itself—one must be consciously proactive.

**Table 24—Suggested Transition Steps for Becoming a Fantastic Volunteer**

1. **Disengage** from the old work; however, **remember** what you have learned.
2. **Reacquaint** yourself (if you need to) with relationships with family and friends.
3. **Take a little time** to be bored. It is cleansing and your mind can heal if it needs to.
4. **Read** about this next “encore” time of your life; stay away from the commercial.
5. **Determine your interests and skills** and/or the skills you want to have.
6. **Determine your drivers for volunteering** and those that keep you volunteering.
7. **Study** organizations that align with your values.
8. **Make a brief plan** of what you would like to do.
9. **Take a step.** Volunteer a little, then perhaps a lot. Do not over commit, however.
10. **Make sure you are an example to all** while enjoying your time.



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Careers end in a variety of ways, many times quite good, sometimes not so good. In either case transition can be hard—very hard. It is extremely difficult to retire or separate, as it turns out, from most anything, even from bad situations. We often do not know what to do with our free time and do not know where to take our minds. For most of us, gardening, making birdhouses or soap, and cutting grass does not really work out so well. **We are human, and at our core, lifelong satisfaction is derived from helping others, not from helping ourselves or from material well-being.** (Do not get us wrong— we have not taken a vow of poverty; we simply want you to understand that wealth only buys options—not results.) So whether we are leaving on top, or from bad situations or bad politics, transitioning to retirement can be time consuming and messy.

However your career ends, as you move further away, the feelings all fade and you end up in the same place as all other retirees. After a few years the CEO and the chauffeur are all on the same dock looking out at the expanse no matter how full their bank accounts might be. Perhaps the messier your career ends, the more likely you are to have the motivation to assess yourself, transition more effectively to retirement and encore volunteering, and make a more purposeful contribution on your next journey. Messes leave one hanging, and that hanging can often drive us forward productively.

***This notion and memory of helping others through human service is the catalyst for a successful encore volunteer shift.***

However grand or difficult the end may have been, you will recall that most of it was good, some was not so good, and you likely will cherish the memories of times when you helped others along the way. **This notion and memory of helping others through human service can be the catalyst for a successful encore volunteer shift.**

We use the word “journey” very intentionally, as it is not what you did at the start or the end of your ride, but rather what you did and who you impacted in the middle of it. **Cling to the best of the past so that you can enjoy the fruits and wisdom of the paid employment to help you with your fresh and new volunteer engagement.** Know that you will impact many more individuals at your new organization if you let it happen.

**Understand that your new assignment will not replace the old.** You will need to be aware of the differences. You should also assess the dynamics and changes occurring in other aspects of your life, especially those within your family. There is nothing wrong with starting small and giving a few more hours here and there, but we adamantly suggest that before you engage with another high level of effort, you establish calm and get your affairs in order. Go see the old friends and the family you have missed. Clear your mind. Perhaps read some of the millions of pages on the web on the topic of retirement and change and make a few lists, thinking about what you might do next, here, there, or anywhere. You need to hear and understand your thoughts and then you will most likely find greater joy in the choice(s) you have made to volunteer.

You have the power to help many while you are helping yourself as well. You may have the opportunity to help directly or advise or teach by example. But you need to make sure you are ready for this larger responsibility. You need to allow yourself to be at your best. You need to prepare to promote effectiveness. If you are reading this prior to taking the next step and volunteering, then take your time and make sure you are ready to be in service (see the above). If you have already begun, then work to be conscious of your transition and your reactions to the new pace. Again, **the transition can be hard. And it will be harder if you did not leave time to organize your thoughts, appreciate all of what the past has taught, and bring some renewed zealously to your new position or activity.** So again, get ready. Your new organization will appreciate and thank you for thinking about your transition to your volunteering encore performance.

***The transition can be hard. And it will be harder if you did not leave time to organize your thoughts, appreciate all of what the past has taught, and bring some renewed zealously to your new position or activity.***

## 8.2 Attitude

As we are prepping for this next stage of our lives, we can get overwhelmed with what lies ahead. We read and we read and we read, purposely—or not—about the “encore” time of our lives. It is like a giant spotlighted billboard follows us around, a constant reminder of the changes to come. One cannot hide from the message. There is no way to get around what is to come, no one gets a pass. Thus, we suggest you embrace it and dive in and accept the work and service that is in front of all of us.

Aspiring encore volunteers already know how to perform the details, the daily tasks and processes of going to work. **You are experienced and wise. You have special skills, combined with a rewarding opportunity in front of you.**

You get to wake up each day (or night!) and choose who you are and how you are going to behave because no one is paying you to follow the creed. No one is relentlessly driving you towards never-ending goals and objectives. You are no longer living on the edge of the daily grind. That was all very exhausting at times, was it not? But you are past that. Congratulations! Let us now consider how important your attitude is and how it will affect your contribution to volunteering.

***You are experienced and wise. You have special skills, combined with a rewarding opportunity in front of you.***

There are literally millions of articles, books, and seminars on attitude, and we suggest you browse a bit and find some that speak to you. We will specifically refer you to a post placed on June 25, 2013 on Linked In by Dr. Marla Gottschalk, an industrial/organizational psychologist. She reiterates that “positivity matters.”



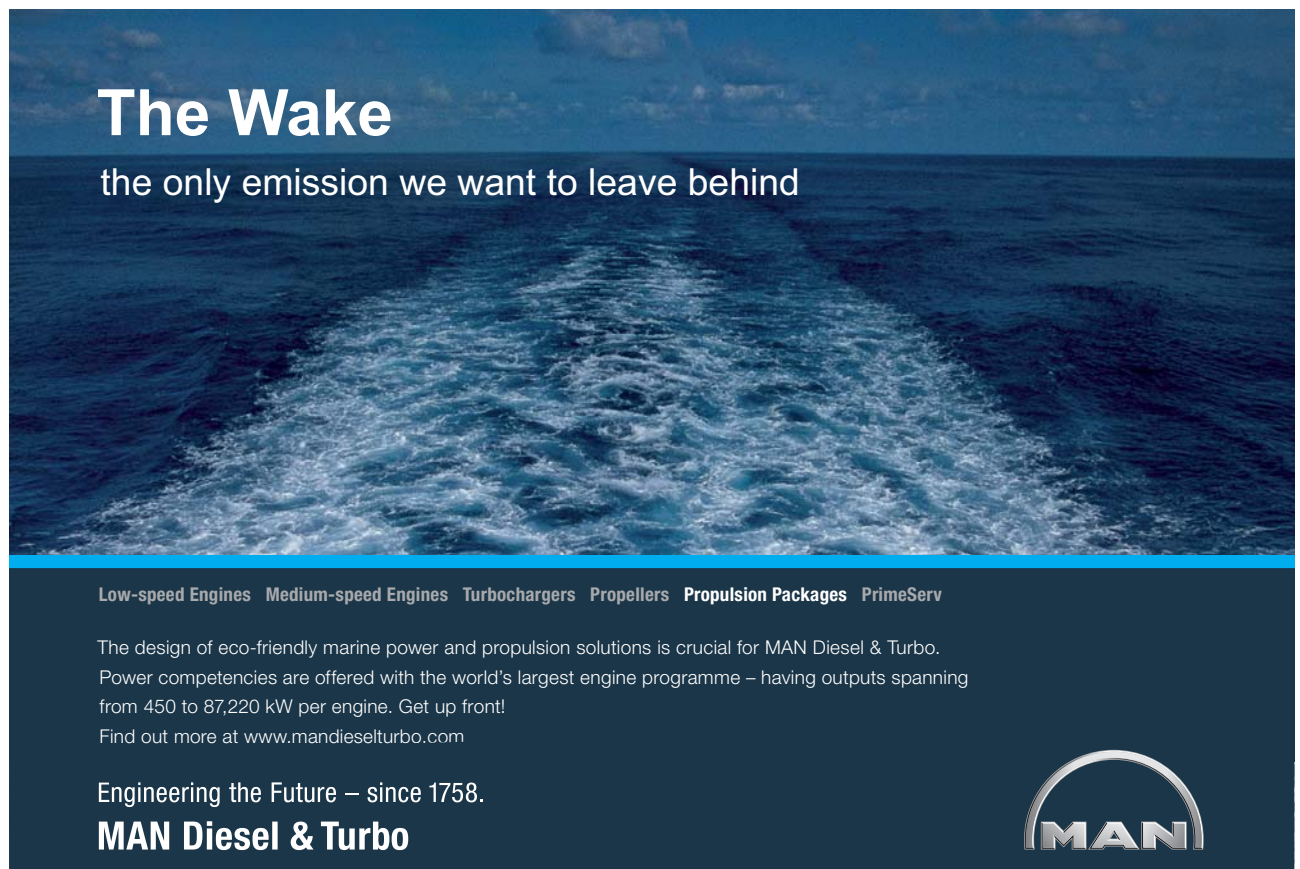
We simply call this attitude. Folks, **bring a good attitude to your volunteer organization. Be the 50+ role model you can be.** It's a choice, plain and simple. You should have no negative history with this new organization, so choose to be positive every day (okay, most days—we are still human). “Just Do It.” We promise it will feel good.

You can bring a positive attitude to your organization in part by utilizing your psychological capital as defined by the PsyCap HERO resources, taken from Gottschalk's post, and modified below a bit. We can bring these attributes to our new organization.

**Table 25—PsyCap HERO Resources**

- *Hope: Tomorrow can be a better day, about a better future.*
- *Efficacy: You are important and can help by being positive.*
- *Resilience: There is no quitting. Perseverance rules.*
- *Optimism: We will be successful.*

These attributes will lead to better results for you and your organization. They will lead to a more enjoyable volunteer environment and they will allow you to effect change in your new organization by simply showing up with a good attitude. We do not argue that you should be Pollyanna, but we do argue that **you have a choice in helping to set the temperament of a place to which you have chosen to dedicate your time.**




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Bring a good attitude to the ball field and win more games. Period! As a wise encore role model, you can help the team succeed. And, finally, for those who are becoming volunteer managers be careful whom you select for the sometimes scarce volunteer roles. And be especially careful as you choose new managers. Find those new people who generally like life and perhaps see life as one grand country club of opportunity and will spread their good cheer. Managers, provide hope and safety, and allow others the space to enjoy and succeed. Attitude matters.

### 8.3 It's All about Your Leadership, Encores

Let's talk leadership. Not the pop, mall bookstore hype, but true leadership. Understand what "leader" and "leadership" mean. **Know what it means to lead people vs. to simply organize and assign tasks.** Use your gray hair to your advantage as a sign of experience. Use all of your abilities, including your age, to help the volunteer organization thrive. Be the leader you have dreamt about. It takes some practice, so practice. Read about leadership—there are many good articles and books on this topic. Read biographies of the great leaders. We urge you to be a 50+ leader.

**Know what it means to lead people vs. to simply organize and assign tasks.**

Given there is just so much good literature available we felt that we did not need to reinvent the wheel. We choose instead to offer and start with what Steve Tappin, for example, published in a June 25, 2013 article on Linked In called "Nelson Mandela's Legend: 7 Leadership Lessons." We believe Mandela is an epitome of leading by example. What we then do is offer up our interpretation and attempt to provide some next step guidance. Action steps provide you a place to begin.

What follows now are Tappin's seven Mandela lessons:

**Table 26—7 Leadership Lessons from Nelson Mandela:**

1. *Master your meaning and your emotions.*
2. *Treat the losers with dignity and turn them into partners.*
3. *Shift perspectives through symbolism and shared experiences.*
4. *Embody the spirit of Ubuntu.*
5. *Everybody feels bigger in your presence.*
6. *Build a sustainable fellowship around your cause.*
7. *Bottle the dream for future generations.*

**"(1) Master your meaning and your emotions"**—A leader needs to show no fear, and a leader needs to stay optimistic in the face of foolishness and difficulty. We tell our people not to worry, and then we turn around and worry. We must be careful how we act, but much more careful in how we re-act. Volunteer, know your emotions. Practice a little bit of stoicism. Lead your people, lead your colleagues, and be strong. Omit words that have no value. Be deliberate and calculating with your words and actions. **Be highly mindful of negative thoughts and criticisms.**

**“(2) Treat the losers with dignity and turn them into partners—No one is more dangerous than one who is humiliated.”**—There are always some individuals in any organization that will push you, who will test the system, and who will not organize around and help the whole. As a leader you can calm them and you may be able to win them over. They are often simply the unhappy. Do not use your power to “take them out.” Use your experience and wisdom to turn them around and give them an opportunity to change. Then help them change and find their way.

**“(3) Shift perspectives through symbolism and shared experiences.”**—Lead your organization from the front and set an example for others. Show up early and stay a bit late. Bring people together through food and play. Create teams that work together. While you must attempt to bring everyone and everything together, you must also rid organizations of any cancer you encounter. People in volunteer organizations come together to do good things. They do not come together to endure what they can find easily through paid employment.


**“(4) Embody the spirit of Ubuntu—we are human only through the humanity of other human beings.”**—As a wise 50+ leader, bring the people together in your organization. Bring together folks with differing opinions and have them chat through the issues. Find common ground. If you are on the staff, or on the line, invite those who do not work well together. Be the catalyst that brings a little harmony to placing sandbags on a rising river. **Leadership comes at all levels of the organization—do not forget this.** Develop trust with everyone so that you can help bring them together for your particular mission or purpose. Know that you do not have to be the “boss” to be the “leader.”

**“(5) Everybody feels bigger in your presence.”**—Being a leader means that you will be examined. At times you are being criticized, at other times you are being praised. But you are always being watched. You must be able to walk steadfastly, on the line or at the podium. **You must learn to have pride without ego and to have considerable humility as you stand in front of or with your team.** On the ground, make it fun and lift up the room with your optimism and your lack of fear. Be your years and give away those years of experience and wisdom.

**“(6) Build a sustainable fellowship around your cause.”** The primary message here as a leader is to include, not exclude. Be open and honest with all those you encounter. You have volunteered at an organization. If you cannot lead, cannot mingle, perhaps you should not be there at all. **The most successful leaders in any organization are acquainted with all layers of the organization and are as comfortable playing softball with the warehouse folks as attending a black tie event with the “Suits”.** Be one of all the people. Find common ground with as many in the organization as possible. Become the one people trust, the one they go to in times of need. You will find this all quite exhilarating and satisfying.

**The most successful leaders in any organization are acquainted with all of the organization and are as comfortable playing softball at the company picnic as attending a black tie uptown event.**

**“(7) Bottle the dream for future generations”**—True leaders are difficult to mimic, but study their habits and styles and learn as much as you can. Leadership is as much about how you behave as the decisions you make. We might suggest that the most important thing you can do in your volunteer organization is to have an honest and open presence. If someone wants to learn from you, take him or her on as a mentee. We have mentored many, it has brought much joy. Be the rock; show others how to do the same. This is important so that the work you do is accomplished effectively, but also so that those around you find purpose, enjoy themselves, and perhaps most importantly, keep coming back as volunteers so that the work can get done.



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## 8.4 Summary

We summarize and deliberately repeat ourselves here in our closing. We want / expect three things from you, the “encore volunteer.”

- We expect that you transition from your old place to the new in a healthy and thoughtful manner. Remember the past, repeat the good, learn from the bad and do not be grandiose about or tainted by either.
- We ask that you bring a great attitude, for you have done many things that you can bring to your organization and we want people to be receptive to your teaching.
- And finally, be a good leader and role model even if you have never purposely led before. We know that anyone can learn and that anyone can teach, so learn and teach yourself and others how to be healthy and productive inside of your volunteer-based organization.

Thank you for thinking about these things. We need you and volunteer organizations need you— good luck! Every next step can be the “best ever.”

**Table 27—Key Points to Remember**

- **Transition:**
  - *Preparation is as important as execution.*
  - *We derive satisfaction from helping others; this is a catalyst for a successful encore volunteer shift.*
  - *Use your wisdom and experience.*
- **Attitude:**
  - *You have special skills, combined with a rewarding opportunity.*
  - *Be the 50+ role model you can be.*
  - *Use your psychological capital (hope, efficacy, resilience, optimism).*
  - *Remember that you help set your organization's temperament.*
- **Leadership:**
  - *Know what it means to lead people versus to simply organize and assign tasks.*
  - *Consider Tappin's Seven Mandela leadership lessons.*

# 9 The Sustainable Organization

*Building capacity that grows past our own days is the ultimate reward.*

Sustaining and celebrating—perhaps these are the pinnacles of organizational success. In this chapter and the next we will make the argument that you have built little if what you built is not sustainable—and we will chat about just how important celebration and recognition are to this cause.

***In our fast-paced and chaotic environment we often forget to build to last.***

We feel they mesh well in the context of our discussion. We begin with an overview of how you can contribute to the sustainability of your organization through your individual choices as volunteers and/or managers. We will again emphasize motivation, both in theory and practice. **In our fast-paced and often chaotic environment we forget to build to last and to celebrate our achievements; we forget to build individual and organizational capacity and we often forget to celebrate each other.** We must not forget to pat ourselves on the back, as we are constantly giving of ourselves to address others' needs.

***Lasting sustainability and continued motivation start with foundational human behaviors.***

There is much to juggle as an organization moves beyond the excitement of a start-up or the reactive capacity of an emergency into a more mundane and tedious service environment. There is no shortage of material to read about healthy organizations, proper workplace behavior, and subjects such as motivation or “team building”. We want you to start thinking hard about how you can sustain your organization, and what you can do right now to begin. We believe that it all starts with how we treat each other and how we manage those who volunteer for us. **Lasting sustainability and continued motivation start with our foundational behaviors.** So we will touch quickly again on motivation and then offer what we call our “First Ten” steps for establishing a sustainable organization.

**Table 28—Chapter Overview**

- *Motivation, Maintenance, and Sustainability*
- *Motivation in Practice*
- *The First Ten Steps toward Solidifying a Positive Attitude*

## 9.1 Motivation, Maintenance, and Sustainability

We will start with what we call “motivation on the line,” as in “assembly line” where the work is actually getting done. These are actions you can do right now to help get you and your people fired up and moving along on a successful journey. As you read through these suggestions do not forget that it is still ultimately about the work. We still need our people accomplishing objectives and closing projects. However, foundational motivation can be a gateway to and the sustaining factor for the good work.

Motivation can be a difficult and finicky item in the longer term. As we have read and said, it's like bathing: it needs to be done quite often. Volunteers, you need to stay motivated in the midst of adversity and boredom. Managers, you need to keep this in mind as you interact with your team(s) and your people day in and day out. **Motivation is fleeting unless permanent change is accompanied in its application.** Keep this as your focus as you do your work and manage by walking around. Not only should you encourage and cajole, you need to use these sessions to teach. You need to imprint a positive attitude in your people and a desire in them to deliver and accomplish great things.

To add to the sincerity and humanness of an interaction, we believe **you must always take steps to engage with your teammates** in their assigned locations. As a manager, reach out to and visit your people. Do not make them come to you for an audience which might be intimidating and stifle their own self-worth. You need to see where they work and what their conditions are like in order to successfully motivate them. Napoleon often led in front during battle and ate with his men. No matter what your politics, take a lesson from a great motivator.

**Motivation is fleeting unless permanent change is accompanied in its application.**

As a peer, make conversation with your neighbor. Do not hesitate to compliment when deserved and help when needed; take the extra moment to listen, eat and have coffee with one another. Invite that loner along with you next time and be interested in their life.

**Table 29—A Few “Get to Work” Motivational Quotes**

*“My suggestion would be to walk away from the 90% who don't and join the 10% who do.”  
(Jim Rohn)*

*“You cannot plough a field by turning it over in your mind.” (unknown author)*

*“Knowing is not enough; we must apply. Willing is not enough; we must do.”  
(Johann Wolfgang von Goethe)*

Do not be selfish with your friendships or yourself. And, yes, we know there is much eating mentioned in this text—it's the great equalizer—food is universal, calming, and shows that you can have a few manners and be polite.

Also, be careful of having too many bad days—this can de-motivate. Motivation is very temporal. (We never have been too fond of those weekend hotel get-up-and-go sessions to recharge in the face of real adversity, as by Tuesday it's just another day and the problems remain.) We believe motivation should be simply a gateway to positive daily behaviors, which then leads to sustainability in an organization. It can open up people's minds and hearts for good work and service.

We all must actively participate in the sustainability of our organization. We must get our people past “shot gun” motivation, only thinking and planning, and get them to accept that motivation requires significant maintenance. They must learn that “doing” every day with a positive presence will be the fire that continues to inspire and sustain good work. We all need motivation—we just need to make clear that it is simply the beginning of greatness, not greatness in itself.

**We all must actively participate in the sustainability of our organization.**



## 9.2 Motivation in Practice

As we mentioned, there is no shortage of motivational literature, discussion, and blogs. Society is overwhelmed by the motivation noise. Google “motivational quotes” and you will have a decade of daily sayings to overuse. We have to ask, though, what good do these do without action? We all need to engage in practicing motivation. We all need to know we are appreciated every day of the week. In order to keep a good team, or ourselves, for that matter, on task and in good spirits, most people will require continuous motivation. Very few find the willpower to sustain this on their own and to affect a positive presence and set of actions, especially in isolation. Fewer still really know how to self-motivate.

One particular challenge with motivation is that **we must often undo before we can do**. Unfortunately when we use party-like motivational techniques in the local hotel with cake, ice cream, games and balloons, and lots of cheering we mostly layer on the new attitude over that which we have not undone, the old behaviors which we all hang on to. So when the veneer starts peeling off in a day or two, or (we like to say) by Tuesday when we are back into our work full scope, the old habits come back quickly as they are at our core. It is a shame, but it is a reality. We need to understand and accept this, and move along with the resistance.

### **Undoing...**

*We must sort out the unhealthy situations. If we happen to have a volunteer who brings everyone down we must correct this. If we have a manager who communicates at 120 dB we must calm him or her. If we have 50 projects and no priority, we must prioritize. If we have artificial deadlines and goals that are unreachable we must provide some reality to our situations. And if perhaps we have a boss that keeps piling on the work without regard to our workloads we must undo this practice, let people catch a breath—make a delivery, and feel accomplished. For if we have no active gratitude for what our people or peers do, and only a “not enough” attitude when they don’t do as much as we want, we must have a hard look at ourselves. We must adjust, and allow our people to finish what they have started with some pride, ownership, completion, and celebration. People need closure.*

Productive organizations usually have someone, somewhere behind the scene, who understands the above and practices motivation continuously. This is why when we see this particular volunteer leave the organization, success for much or all of the staff wanes quickly. Our objective, thus, is to have everyone, or at least as many people as possible, be this special person, so that institutional attitude continues to be a positive force and the work of the volunteer organization can continue being successful and sustainable throughout staff changes. We must build sustainable organizational capacity and thus practice in all we do.

So here are our “First Ten” steps toward solidifying a positive attitude in the organization. Why first ten and not top ten? Because we understand we cannot pretend to know the thousands of things that might motivate every person you will encounter throughout your journey.

Also, we like to keep the management of ourselves and others as simple, as applicable, as grounded, and as concise as possible. We present a starting point and we will be as brief as possible. Remember, this book is ultimately and always about action, but we also know that items that may be simple to speak of can take years to perfect.

**Table 30—The First Ten**

1. *Sit with each other.*
2. *Practice empathy.*
3. *Praise in meetings, praise in public.*
4. *Insist on quality.*
5. *Never blame. Find solutions. Never gossip.*
6. *Explain why.*
7. *Be a coach. Practice coaching.*
8. *Eat with one another.*
9. *Be positive at all times.*
10. *Use motivational words.*

We argue that this “First Ten” list is a good place to start. Start acting in these ways and you can add the insurance of sustainability to the organization. This will increase the likelihood that the machine will hum and that you will find even greater purpose and success in what you do.

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### 9.3 The “First Ten”

#### 9.3.1 Sit with each other.

Get the most out of your time and friendships with your co-volunteers. Do not look at your watch. Shut off your phone! Time is of the essence—time is all we really have. *In Time (2011)* is a dystopian blockbuster movie about time as the unit of currency. Minutes and hours are traded like dollars. We feel this film and concept is quite relevant to our add-on, over-taxed, over-busy ways of today. (This is a very well done film in our opinion.) Time is like a roll of toilet paper: the closer you get to the finish the faster it swings around. Spend quality time with other volunteers and do not look at your watch, email, etc. Avoid back-to-back meetings when possible. (Although, take note, we can often use back-to-back meetings as a premeditated excuse to end a particularly useless get-together.)

**Do not rush your relationships.** If you are the big boss, and you sincerely give people your time, it becomes a powerful motivator. When staff all feel they are actually taking time for one another they all become much more secure and positive about their environment, adding to overall sustainability. Think of time as currency, as the movie *In Time* does (Israel et al., 2011). Give time to each other—it acts as “relationship currency” so that more can be accomplished another day.



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### 9.3.2 Practice empathy.

Active listening has been all the buzz, but sadly, much of the buzz is about false appreciation. For if we need to act actively are we sincere? Do you really think that folks cannot tell when you do not really care? They may not be able to articulate why they feel that your last conversation with them was not quite right, but they certainly feel it. Take the time, as mentioned above, to sit with them, and then work to truly find yourself interested in your fellow human beings. Everyone has something to contribute. **Everyone has something to teach, something to say. Everyone has interesting qualities and talents. Find these things in all people and places.** When folks know you have empathy for them they get motivated about doing their work and they actually like hanging out with you. Active listening comes easily if you *want* to listen.

Some will say that compassion is empathy in practice—that compassion is about action. When people have problems and you help or are there for them, they know you care and know you have empathy and compassion for their issues. Your peers, your bosses, and your subordinates (it works in all directions) are then motivated to do good work for the organization. Note to managers: if you do not truly like people, and cannot practice empathy, then you probably should not be a manager. Develop relationships across the entire organization, in part by learning empathy and practicing compassion, to help get the work done each and every day. And then, over time, you acquire fun, motivating, and sustainable relationships. It is a bit like the chicken and the egg. Someone has to begin—let it be you.

### 9.3.3 Praise in meetings, praise in public.

Organizations post motivational posters all over the walls stating some form of these words about praise. This is repeated in various contexts over and over and over, but alas, do we do this well? We don't think so. Learn how to praise one another. Learn how to look each other in the eye and say, "Great work, nicely done, I am proud of you/this." Learn to be able to look someone in the eye and state, "I am proud to be volunteering with you." Do this publicly, do it often, but only when it is true. Do not praise falsely. Unjustifiable praise will do more to wreck a team than just about anything else. It is extremely unproductive. That said, **do find reasons to praise.** Say it out loud and say it as deserved. Practice this, as it can be hard. Praising is emotional and some think too much shows weakness. But we are not machines, we are people. Emotions, as well as pride without ego, are good things. Practice this-- practice being vulnerable about praise. It will motivate just about as well as anything else you might do today.

### 9.3.4 Insist on quality.

How and why does insisting on quality help to motivate? It is simple—once your people know that they can perform at a level that they did not think they could perform at, there is no going back. Quality provides sustainability in a number of ways. Everyone is proud of good work. Good work provides purpose and good work is sustainable. Quality begets more quality. **Teach as you can—always encourage one another to get each task done with quality. Point out that high quality actually reduces work load, as you do things just once.** A beautiful job begets another beautiful job, as motivation to perform grows as a high quality product is delivered. When was the last time you told someone that his or her work effort was “beautiful?” Seems a little weird, eh? That is because we never say it at work. We do say it in many other situations. “What a beautiful move to the basket!” “What a beautiful catch at third!” “What a beautiful dinner.” “That’s a beautiful fish or sunset.” If we can complement professional athletes, restaurateurs, and fisherman, we ought to be able to complement our volunteer peers, bosses, and subordinates, shouldn’t we? Insist on quality and insist on beautiful work. Articulate this to one another and all will become increasingly motivated and the organization more sustainable.

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### 9.3.5 Never blame, find solutions, never gossip.

There is no shortage of discussion on these topics from the secular to the religious, so we are quite curious—how come so many people talk about other people, blame something external for a shortfall, and generally just gossip about anything and anyone? Because it is easy to do. It goes to our core weaknesses as human beings and empowers folks as when we bring down another we are attempting to raise ourselves. (Try to spend a day without talking about another human being—ah ha! You can see how entrenched these behaviors are.)

Examine for a moment what it is like in an organization when we blame one another for disruption or our lack of enthusiasm. Imagine volunteers criticizing each other, attacking one's weakness, and each other's inability to deliver. These unhealthy behaviors can bring down any organization, department, or unit. Stop these behaviors if they persist.

In addition, it appears that in today's self-esteem-driven environment we are personally never to blame for anything. It is always someone else or some outside external force or cause and effect that has got us down. **Blame is destructive. It shows a lack of responsibility** for what is at hand in the moment. Sure there can be some short-term benefit to pointing fingers, but really in the long run it is entirely destructive. Speaking out loud, "Not my fault," and articulating blame is a deal-killer motivationally. Sure, there is nothing wrong with speaking to the "enemy," a.k.a. the problem, and then attacking that problem to find solutions. But do not blame. Do not make excuses about why you cannot do what you are supposed to be doing.

Along these lines, though a bit more personal is the act of gossip. Alongside blame, gossip is as bad or worse. It is a sign of weakness, a sign that you need to uplift yourself in front of others. Need we say more? None of us are perfect, but we all need to try every day to take responsibility for ourselves and not point at others. **Lose the gossip.**

### 9.3.6 Explain why.

This is particularly important for you, volunteer managers. We suggest that you see that your people know why they do what they do and why you do what you do. Volunteers, do not be afraid to ask "Why?" **Motivation, and thus sustainability, can be impacted and improved if people know why they are doing the task at hand.** All of us benefit from this. Explanation takes time, and we refer you back to item 1 in this list.



At your meetings, do not just tell each other to do a series of tasks. Explain what to do and why it needs to be done. Sometimes we cannot say why exactly, because of politics or personality differences. But everyone knows there is always a why, so address it even if you just say “politics.” Like most things of value, explaining the “why” takes time, but it will reduce time consumed in later explanations. It also results in enhanced quality, thus saving even more time in product or deliverable redo. Just as “because” is never a satisfying answer to a child asking “why?,” this response just does not cut it with adults either. And, pay attention people, there is a new generation of young people and many generations of knowledge workers/volunteers who characteristically all want to know “why.” If volunteers do not know why they are doing a task, very simply, there will be fewer volunteers that show up on the job site over the long term.

### 9.3.7 Be a coach, practice coaching.

Coaches motivate full time, on the practice field, during the game, after the game, and while training. In short, coaches are teachers. You need to think of yourself, should you be a volunteer manager, as a coach. This will help you determine how you will implement the “management” tasks at hand. **If you think coach first, rather than boss first, you will be a better manager and motivator and build the capacity of your organization.**

**Volunteers, you also need to coach and teach one another.** While many of you may be at the same level from a staffing perspective, some of you are more experienced than others. Take the responsibility to help one another and coach people through their work and service. Your words impact people’s lives. You can coach every day and you should be coaching every day. We include this in our first ten to get you to think about what you say and do in every interaction, not just the situations you feel are critical. The challenge we will present to you is this: for the entirety of the coming week, ask yourself, before speaking to someone about their work, would my good old coach have said what I am about to say? If not, perhaps think again. Coaching is motivation in practice. Motivation every day leads to organizational longevity and thus sustainability. Bad coaching destroys people’s attitudes. **Practice good coaching.**

### 9.3.8 Eat with one another.

Again we talk about food—that’s because it may just be the place to begin **and** the place to end. Sharing food is universal, it is binding, and it creates a closeness that few other things do. Eating is personal and it is a requirement that we all share to survive. Eating with those you work and live with is the longest of sharing traditions in all cultures. **In our hurry-up, fast-food society (read fast-food relationships) we have forgotten about taking the extra time to eat with one another, and especially to eat with one another slowly.**

In many cultures no work is done prior to eating. Eating shows others that you can be polite, that you enjoy each other’s company, that you are interested in your peers’ well-being, and that you respect them and their time. Feeding ourselves requires etiquette and manners, and when we act mannerly in front of others, respect is generated, motivation gets bathed, and people desire to improve their work effort.

We suggest below an action item.

When you go to eat with your peers or your volunteer staff, do not talk about the work for at least 30 minutes. You will need to practice this, as the work or service is what brought you all together. However, the camaraderie and sharing of life is what will keep you together. Talking about work is what we always do, thus it will be hard to refrain. But the ability to leave work to the side for a while will show the people you are with that you are interested in them, not just their work. And when you are interested in them and they know you care about their lives, they will feel better about being part of the volunteer team. This motivates them to do more good work and service, making all things more sustainable.

Recently we took an entire team out for coffee and scones at a local coffee shop. You would have thought that we had bought them a steak dinner, a round of golf, and tickets for a show. In 20+ years of buying a whole lot of food, we have never seen a bunch of more grateful people over this cup of coffee. The results were amazing. A simple offsite meeting, costing a whopping \$28, contributed to their already strong sense of camaraderie. In fact, most folks did not even order a donut or a scone. Just the idea that one was willing to buy something for everyone and meet externally away from the office did more for motivation that week than a \$300 Moto-Party (our new word to bash the Saturday afternoon rah rah motivational meetings) webinar ever would have.

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Eating with people shows you enjoy their company, that you are willing to share your personal time, and that you are just plain willing to shell out for lunch. Motivation equals food just as it has for eons. Eat with each other, eat with your boss (if you can), eat with your staff; eat with just about anyone who has a role to play in your organization. It is amazing what a few donuts and coffees can do for the health of team.

### 9.3.9 Be positive at all times.

Negativity quickly ruins everyone's day and it absolutely destroys motivation. Negativity is a cancer in organizations, and it is contagious. Positive people become less so, and negative people get even worse. A group that is going along just fine can quickly turn unproductive once a negative personality is added to the mix. And then that group can begin to affect those it interacts with regularly. And if the boss is negative, forget it. If you continually despair over life—see [www.despair.com](http://www.despair.com)—why would anyone get fired up and motivated to do work with you or for you? Let me see, I think I will happily do great work, beat expected deliverable dates, only to get a blank stare or some negativity from my peers and boss. Probably not going to happen! Along the same lines, sometimes even not saying a sincere thank you with a smile can take folks down as far as a negative comment, especially after they thought they put forth a special effort for you or the organization. Not being grateful and thankful over time can be a real deal-killer, especially to those close to you.

Volunteers, you need to be positive. This does not mean you must be Pollyanna—but do be positive. Everyone is giving of their own free time to be of service for others. Why would anyone come back if there is despair in the air? Research has shown that a positive attitude results in better work by all and a much higher level of commitment and caring to the cause at hand. Despair is despairing, and absolutely no fun to be around. The competition for great volunteers is fierce and the economy is simply too competitive to be losing time to the negative. So lose the negativity. Be conscious of it creeping into your thought process or your team. It is embarrassing to be around and hurts the overall well-being of all organizations. **Do not tolerate negativity.**

### 9.3.10 Actively use motivational words and be grateful.

When we visit other groups or organizations, we are always troubled by how seldom we hear motivational words from leaders and group members. Simple phrases like “Way to go!” “Nice!” and “Perfect!” are rare. It is such a shame. **The words you choose during your interactions should be deliberate, strategic, sincere, and intentional. Use them wisely and motivate often.** Communicate motivation by using uplifting terms as often as people have earned it. Remember not to patronize, which takes practice and conscious thought. People must earn this recognition, and you must be sure to use motivational words when they are earned and deserved. Now on to a little practice exercise:

We want you to make a little list, or use ours below. Write out 8–10 motivational words (you would actually use) and hang them on your bathroom mirror, above your computer, etc. We want you to say these things out loud so you can hear what they sound like. If you have trouble handing out kind words, if you have trouble telling folks they have done well, if you have trouble being a bit emotional and vulnerable, you probably ought to have a look at your own ego and self-confidence and make some adjustments.

Now begin, volunteer, and please repeat:

- Way to go!
- Nice!
- I'm proud of you all.
- Perfect!
- If I had dreamt it up, I would have short-changed myself—great work.
- I am grateful for what you do.
- Keep it up, please.
- You are really helping the team with this.
- Great work!
- Nice! (Yes we repeat.)
- Thank you.
- I do not know what I would have done this week without you.
- I really need you on this one. How about we start today, OK?

Creating a self-sufficient, motivating, and sustainable volunteer organization is very, very hard. We must be on our best behavior all of the time, we must be vigilant in how we act, and with what we say. We must think of our peers, our bosses, and the management of our subordinates at all times. Sustainability for the volunteer-labor-based organization is fleeting. **Volunteers need purpose, they need to be in a good place, and they need to feel wanted** (as we all do).

**The above “First Ten” can go a long way in making sure our organization is prospering tomorrow.**

## 9.4 In Summary—Practice Management to Attain Sustainability

Management is hard—very hard, in fact. And we believe it is much harder today than it was in the past. Managing volunteer labor is even more difficult. There is no economic requirement, no “food on the table” driver. The driver must be purpose and enjoyment. **Volunteers need to know that they are making a difference almost every moment of every volunteer hour on task.** This not only means the management of your volunteers, it means the management of your bosses, and of course the most difficult, the management of one’s self. Management can be very lonely and has gotten a whole lot lonelier, as we must make many more decisions in isolation today to be effective. There is simply no time to spare and think things to death. We must evaluate alternatives, gather a cost-benefit level of data and information, make the call, move forward, and if you have to, change the course. We must often do all of this quite quickly.

Specifically, while trying to manage up, it can be very hard to get your bosses’ attention. They have their own problems. While managing subordinates you need to make decisions quickly to keep volunteers moving and completing work while at the same time encouraging, motivating, and protecting. Your volunteers need to stay focused, lined out, and confident that what they are doing today is useful to the whole and purposeful to them. After big decisions are made we all know there can be dozens of smaller decisions to move an effort forward. Plan well and deliberately, but avoid the over-planning—it may doom a project before it begins. Plan a bit, and then move forward. There is nothing worse for volunteers (all folks actually) than indecision.

We must remember the lessons of this commentary and these tools to be effective. In addition, we must be somewhat skilled at bargaining, perform a little politicking (not necessarily always a good thing, but necessary), and oh yes, we must remain laser-focused on the objective at hand at all times—the work and service and our all-volunteer labor force.

### Practice management in all things we do!

**Table 31—Key Points to Remember**

- *Lasting sustainability and motivation start with our foundational behaviors.*
  - *Motivate, maintain, and sustain.*
  - *Motivation is fleeting unless accompanied by permanent change.*
  - *Engage with your teammates.*
  - *We must actively participate in the sustainability of our organizations.*
- *We must often undo before we can do.*
- *Practice “The First Ten” steps toward solidifying a positive attitude.*
- *Practice management, managers.*



# 10 Celebration

*We must learn from, remember well, and celebrate intentionally, all of our “Wins,” so that we may know how to repeat.*

Everyone enjoys a good celebration. But then, why is it that robust and meaningful celebration and recognition can so often be lacking, or without much merit, in the paid or volunteer work place? Are we just too busy? Are we lacking this all important step in the management process? And then, at the other extreme, we can find that some organizations celebrate and actively recognize so often for so little that the positive effects are minimized resulting in few taking part in the activities surrounding such events. It turns out that this topic is not quite as straightforward as one might initially believe.

**Table 32—Chapter Overview**

- *Celebration as Management*
- *Closure*

Celebration is a balancing act, for if we celebrate everything too often, we celebrate nothing. And yet if we do not celebrate our successes and our humanity then we have nothing. This last chapter provides guidance about integrating celebration and recognition into all of our volunteer activity. Celebration is the final (and a mandatory) condition of our volunteer experiences.



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...I finally learned to speak it in just six lessons”  
Jane, Chinese architect

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Celebration is important in all sectors of the economy, but nowhere more so than in the volunteer arena. In order to keep our volunteers interested in their work and in feeling purposeful, we need to celebrate often and in a variety of ways. Interest, purpose, and gratitude breed enthusiasm, and when we have enthusiasm in the ranks we have a great chance of remaining sustainable. We need to show one another that doing great work is a great thing and it will be acknowledged and celebrated when it is complete. It doesn't have to be a million-dollar parade down Main Street to be effective. Recall the list of expressions that we articulated in the last chapter that you are to be practicing. A simple pat on the back can be a moment of celebration. A compliment in front of others in a meeting is another. Pizza ordered in for the team is another. Regardless of the forms they take, these gestures offer a sincere message that great performance has been accomplished, noticed, and appreciated.

***Celebration is a balancing act, for if we celebrate everything too often, we celebrate nothing. And yet, if we do not celebrate our successes and our humanity then we have nothing.***

If we express these kindnesses to one another, then we are well on our way to finding and acknowledging that purposeful contribution which we all desire. This will allow us to move our organization along in a healthy and sustainable fashion. Sustainability is captured a day at a time, as the big wins are often fleeting. The small acts of celebration of one another are the ones that we can hold tight and cherish and that build confidence. Celebrate one another, add kindness to the workplace, and the team will excel.

***Perhaps the most important celebrations are the ones where we tell each other that we have simply "done well."***

## 10.1 Celebration as Management

According to Abraham Joshua Heschel (1986), a leading philosopher, activist, and rabbi of the 20<sup>th</sup> century, "People of our time are losing the power of celebration. Instead of celebrating we seek to be amused or entertained. Celebration is an active state, an act of expressing reverence or appreciation."

The primary point, we believe, he is making here is that celebrating one another and our accomplishments is an active state which should be managed. We must define what warrants celebration (being in this state), encourage this state, plan for it, and then reward it. By celebrating this work we set examples for others to follow and at the same time we acknowledge purposeful contribution to our organization. Making the choice to actively manage and integrate celebrations into our organization is imperative as we cannot expect to get volunteers to commit and contribute unless we show some sort of gratitude. This can be accomplished in a large, highly organized and visible fashion or in many small ways every day. We suggest you do both.

In “Monitor Project Progress by Using Micro-deliverables,” Paul Glen, from the TechRepublic, writing on project management (2009), tells us that celebration can be an excellent way to compliment and keep our work on track. The celebration of these small wins serve as an excellent management tool highlighting milestones and progress of a project or process. Glen states that celebrating small should include these 4 steps:

**Table 33—Celebrating and Managing Micro-Deliverables**

- *Never let anyone go longer than a week without owning a micro-deliverable.*
- *Micro-deliverables are either done or not done.*
- *Progress is not measured in effort, but in micro-deliverables.*
- *A micro-deliverable is the responsibility of only one person.*

1. Never let anyone go longer than a week without owing a micro-deliverable.
2. Micro-deliverables are either done or not done.
3. Progress is not measured in effort, but in micro-deliverables.
4. A micro-deliverable is the responsibility of only one person.

This sort of celebration provides ownership and responsibility to the individual, highlighting the volunteer’s task and thus, deliverable.

Celebration and management are intertwined. Shelly Frost, a writer for the Houston Chronicle and educator suggests in her post “Celebration in the Workplace” that workplace celebration contributes to recognition, team building, morale, and motivation. Celebration might be considered to be the final step in all we discuss—it’s the closer. One must find closure in all activities—we must know when we are done. Celebrations, big and small, confirm closure and bounce us forward with hope and excitement to accomplish yet another task contributing to our good work. The cycle then continues and our volunteers return to us in a motivated state.

## 10.2 Celebration as Recognition

In preparation for this chapter, we reviewed many materials, from many authors, and dug into our own celebration experiences (which we admit heavily revolve around food). As one could expect we found an ocean of materials—and that is often the rub at the onset of anything new in the digital age. (TMI, as the millennials say—too much information.) So as we do as efficient project managers we synthesize and provide you with a concise discussion to get you started in developing a plan to recognize those in your organization that are well deserved.

For an easy start in your planning process, let us recommend “100+ Workplace Ideas: Celebrations, Parties, & Gatherings” (11.30.11). The title says it all. Pick a few of these techniques, add a few details pertaining to your organization, and begin. Make a plan, follow it, and change it as needed.

We also highly recommend a wonderful 7-page document titled “Way to Go: Ideas for Volunteer Recognition,” written by Janet Fox, Lisa Arcemont, and Karen Martin of the Louisiana State University Ag Center. It is a very brief roadmap for rewarding, celebrating, and managing volunteers. It even includes a few additional resources at the end of the text. It is an organizational work plan outline for recognition programs that includes a clear explanation of the purpose of those programs.

The table below contains the seven principles guiding recognition that appear in “Way to Go”. They describe the multiple functions of organizational recognition. We encourage you to search out this article, to behave as an organization celebration agent, and to generate a celebration work plan and schedule along with your team. Following the table, we add our own thoughts, opinions, and experiences to their discussion.

<b>Table 34—Recognizing Volunteers: The Seven Principles Guiding Recognition</b>
<ul style="list-style-type: none"> <li>• <i>Principle 1—Emphasize success rather than failure.</i></li> <li>• <i>Principle 2—Deliver recognition and reward in an open, public way.</i></li> <li>• <i>Principle 3—Deliver recognition in a personal and honest manner.</i></li> <li>• <i>Principle 4—Tailor the recognition and reward to your people.</i></li> <li>• <i>Principle 5—Timing is crucial. Time delays weaken the impact of most rewards.</i></li> <li>• <i>Principle 6—Strive for a clear, unambiguous, and well-communicated connection.</i></li> <li>• <i>Principle 7—Recognize recognition.</i></li> </ul>

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To start, we must celebrate success rather than failure—or even success rather than the norm. Principle one has to mean that everyone does not get an award. One of the worst things that has happened to our society is that everyone gets to be a winner just for showing up to the game. This is very apparent in the paid workplace that gives all 80 employees a 2% pay raise. What does that tell the folks that are working hard and over-achieving? That their hard work is valued at the same rate as mediocrity or average at best—this is a motivational killer. No one wins if everyone wins. This is difficult to combat in our new-age, self-esteem, super-highway environment, but combat it we must. Reward great effort; do not reward average. In fact, we take this concept a step farther: do not spend a lot of time rewarding seat time. Yes, we know that showing up is important, but we do not often celebrate attendance, although we do sometimes celebrate perfect attendance with enthusiasm. For the most part let the work and deliverables dictate the reward, responsibility, and compensation.

In principle two we can easily agree that reward needs to be public. It would be nice if we were all self-assured enough to leave our egos aside, but in truth, we need our peers to know and acknowledge our accomplishments. We will gladly accept our awards and recognition humbly, but we need to know that others know, and despite the self-esteem movement, human beings are conquerors and we need to know that we have really won. In addition, recognizing a job well done in private does not show others what good work is. We need others to see who won, and what won, so that they know how to win and repeat it. It is really that simple.

Principle three is clearly about sincerity. We must be honest; we must drill into the personal and recognize what an individual or group has specifically accomplished. Walking by an office or hollering, “Great work, everyone!” down to the floor on the process line does not cut it. We must be specific by delivering a message such as, “Way to get that truck loaded ahead of schedule. Now the folk’s downtown can get their food in time for the holiday preparation.” Show that you know what your peer is doing, what your boss is doing, or what your subordinate is doing. This shows you care, pay attention to detail, and are sincere with your words.

Principle four follows right in line with principle three; we must delineate in detail the and why of the recognition. It also gives us choices and drills into a very specific action, or activity, or specific task we wish to highlight. We need all to see and learn what good work is, and what it is we are trying to accomplish successfully in our organization. Good work needs to be hung on the wall for all to fully comprehend. While doing this we must be continually vigilant however, not to create artificial celebration so the “B Team” gets recognized (principle one). In addition, we need to tailor the reward to the individual. Some may like the spotlight, others a quiet dinner of thank you. We need to detail the specifics of the award and how we actually celebrate those details.

Principle five tells us that we cannot let good work go unnoticed in real time. Specific and frequent feedback is a basic tenet of good management. It is also a basic tenet of volunteer recognition. Wins are fleeting, and one cannot wait six months to tell a group or team that their December labor was excellent during the July celebration. Delay weakens reward.

Principle six highlights the detail necessary to allow everyone in the organization to know (including the recognized) exactly what was accomplished to receive the recognition. Specific and tight award criteria will supply others a road map to follow for success. We want others to repeat what has been accomplished and model good volunteer activity. Specific and detailed award criteria are paramount for repetition and the transparency of fairness in the selection of the awardee.



Finally, to recognize recognition is to highlight others that revel in their peers' successes. We want to take notice of our individuals that bring to the organization an attitude of helpfulness and facilitation. We want to highlight the "good human beings." A person who cares for others' successes in the organization can contribute significantly to lifting morale. It is here that you can reward the person who shows up every day with a positive attitude and a desire to serve others. One last note here, too: sometimes we forget to recognize the boss. We are not suggesting politicking the boss with a little gift on Boss's Day. But rather we mean to emphasize that good bosses are few and far between. Bosses have egos and feelings too, and they can often be forgotten—some people believe that being boss is great enough in itself. Not so; bosses need subordinate recognition and good bosses especially need subordinate recognition. If you have a great boss, tell him or her so after a hard fight has been won or a complicated project delivered.

Fox and her coauthors clearly state that saying "thank you" or "way to go" is the "paycheck" for a volunteer. This is perfect—it translates managerially from the paid work place into the volunteer work place, reiterating that we all need a paycheck of some sort. Volunteer paychecks come, in part, in providing services and feeling useful, in the friendships that are formed, and in the inner purpose we all long for. We have stated this many times in this book because we must be vigilant in remembering this as we all make our engagement and participation choices.

### 10.3 Closure

Celebration is an art, it is part of humanity, and it is an integral tool of day-in and day-out managerial processes.

We must celebrate the micro-deliverables and the huge successes. We must celebrate with big dinners, and we must celebrate with small compliments and donuts. It's a shame, but folks get used to being average. Do not let them. Expect them to be better. Take their limits away. Help them find greatness and continuously use motivational techniques along with sincerity to encourage them. Celebrate excellence. Practice is essential. Practice civility, practice motivation (every day), and managers, please practice management. You need to be conscious at all times that we are people who need to support one another. We must help each other feel good about our work and service. And, as we use our minds more than our bodies to undertake our efforts we need always to remember that we are human, in a world that wants us to be "meta" (machines).

***Celebration is an art, it is part of our humanity, and it is an integral part of day-in and day-out management processes.***

Motivate one another forward into a renewed humanity of service, hope and spirit, faith, altruism, and good and purposeful work. Then sit back and enjoy. No, rather stand up and celebrate the real successes, big and small. These freedoms will keep volunteers coming back and maintain and sustain your organization. The bottom line is—humanity is good for our business, no matter what that business might be. We all need to be vigilant and hold onto this notion, as the fast-paced add-on world might just slip it away from us while we avoid the acknowledgement of each other—and our purposes.



Now as we come to close we have obligated you to a lot. We want you to find your way and make the most heroic contribution you can to good volunteer work and service. We know you have given up your precious time. We ask that you find your purpose and we ask that you bring to your organization, any organization, the attitudes you have read in this volume. These are so very important. We need you. We need your grace. We need your skills and your mind, and we need you for each other. For without each other we have nothing as an organization. We want to be as successful as we can, we want to be sustainable, and we want all to find benefit.

**Table 35—Key Points to Remember**

- *Have Fun.*
- *Cooperate.*
- *Celebrate.*
- *And, Enjoy One Another.*

Help move the good work forward as you find your way with volunteering.

In closing, we celebrate you—as you have come to the end of this book—a great step, in our most biased opinion, toward becoming an accomplished and successful volunteer.

Congratulations!

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# Epilogue

This is a book about how to get the most out of your volunteering commitment, about managing volunteers, and about some of the unique tenets of the unpaid labor force and the organizations that rely on that labor. All of that said, what we present to you is a book about people, their choices, and their precious time.

It is a book we hope provides you a road map for your successful venturing into the volunteer management of one's self, one's colleagues, one's subordinates, and of one's superiors. There is a lot of information here. And there are millions of pages written on management, volunteering, service, and on just about whatever you might like to study in this silicon-chip age. With so much available, where does one begin? Our goal was to provide you that starting point. We want to help you embark on a productive journey of being a volunteer, engaging with your organization, and if applicable, managing volunteers.

Volunteers come to organizations for a wide variety of reasons, with a wide variety of skills, and to offer a wide variety of services. It is an extremely difficult task to engage in and manage to a successful end. Managing people is hard. Managing one's self is hard. Managing service workers is hard. And, managing knowledge workers is even harder. Combine all of the above and it is clear that we have a significant and daily challenge in front of us as volunteers. Few do it well. We must retain some rational objectivity, but we must get out of our own heads to see others purposes as we engage in our volunteering activities. We all have our causes, and we all have passions as we come to the table. Know this and manage these toward a positive endpoint.

This book is also meant to be a manual of sorts—for you to refer to again and again, to make notes in, and to take actions based on what we have written or based on your synthesis of what you have perhaps learned. So we suggest you take some action, write some things down, make notes, recall how those actions may have worked out or not, then adjust, and take more action. We cannot think our way to success, although many sure give it a try. We must “do”, learn from that doing, and repeat. In closing this book, and thus, in starting your journey, let us put into practice some of the items we have read about, let us take some action, let us study and learn and improve, and let us begin here.

As you begin or return to volunteering, we want you to answer the question “What key thoughts should I take with me?” We would like you to concentrate on five. There are many other points you have learned, but if we have too many rules to begin any new or change management process, we often find ourselves losing track and eventually accomplishing nothing at all.

First, choose to have fun and enjoy yourself. Practically speaking, why bother giving away your time otherwise? The exact work you do might not be what brings you pleasure, but there must be something in it right off that gives you some joy. That may be meeting new people, gaining experience in what you wish to learn, or helping others. The point is to choose to have a good attitude and to have some fun!

**Table 36—Start Here**

1. *Have Fun*
2. *Make a Plan*
3. *Follow Your Plan*
4. *Learn*
5. *Celebrate*

Second, make a plan. This can be a five-page well-organized essay if you are of the overachieving type, or you could just make a few notes on a small pad of paper. If you cannot write your strategic plan's objectives and a few of the steps to reach those objectives on something you can fit in your pocket you just might have a hard time telling others what it is you want to do and why you want to do it. Keep it simple, make a plan, share your plan with someone, incorporate the feedback, and move forward.

Third, implement your plan. It sounds obvious, but often it isn't. Everything may not be perfect. Some things may seem a little hazy, but just do it anyway. Implement the plan you have articulated and do not worry if it might not work out just as you had wished. You will almost always have to adjust along the way, change your plan as needed, and change the rules of engagement and objectives in order to find a win. Do not fear whether your plan is on the mark exactly. Make it, implement it, change it, and succeed.

Fourth, learn all you can about the organization you have chosen to be a part of, and never stop learning. Read the financials, read the annual report, Google the subject, chat with anyone and everyone that will speak with you about what they do, what they like, and how they do it. Don't you hate it when you go into a store and ask a question and the person on the floor or behind the counter does not know the product and can't help you? Do not be the person who cannot answer questions about the very organization where you are volunteering. Be the expert. Know everything you can, practice everything you can. Missing is not failure.

***How do you learn to hit a ball? You hit a ball. It is really just that simple. First know and believe that you are going to hit it well, and if you miss, know that missing is learning, not failure.***

And fifth, as you would probably expect by now, celebrate. Celebrate each other's good work. And more importantly, celebrate each other's passions, diversity, cultures, and humanity. Be human, be emotional, be vulnerable, take a little risk and this will move you toward the purpose you seek and the good work you expect to deliver. Furthermore, it will make for a more sustainable organization where you can volunteer for years to come.

In closing, trust the processes. Trust us—we promise these strategies work. Practice what we articulate, or at least some of what we articulate, adjust as necessary, and good things will come to you and your organization. But, it is up to you to choose to begin your volunteer service, to begin at the beginning to gain some experiences, to begin your encore volunteer career, or to actively step into the second or third or fourth phase of life—you are where you are. The point is to start.

Begin here. Begin with the above. Get on with it. Adjust and enjoy.

Good Luck!

Karl & Mike



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# Authors

## **Karl E. Burgher, Ph.D., P.E.**

Dr. Karl Burgher, P.E., holds a Ph.D. and an M.S. in mining engineering, specializing in pricing and markets, costing, and resource economics, as well as B.S. degrees in both engineering and economics. He has worked almost 30 years in higher education institutions, including Indiana State University, Missouri S&T, the University of Maine-Presque Isle, Fairmont State University, and Montana Tech.

He has carried out administrative duties as chief strategy officer, vice president for research, center director, director of institutional research, and president. He spent a decade of this time managing contracts with federal and state governments and with the private sector. Much of his work has involved university start-ups and change management. He has also held the rank of Professor and has received tenure in mining engineering, civil engineering technology, business, and built environment departments. He has taught courses in management, construction management, engineering management, business and economics, explosives engineering, operations research, simulation and project management. Karl recently stepped down as chief strategy officer at Indiana State University and is currently a professor of the built environment.

Dr. Burgher's extensive experience in volunteering and in managing volunteers spans over three decades. His initial experience was in the management of a small food buying co-op while an undergraduate engineering student. He has provided educational outreach, strategic planning, and technical assistance to numerous organizations and communities, including work paid for by the US-EPA in economically disadvantaged urban Hispanic communities in Denver and Pueblo, Colorado; and for Native American tribes across the western United States. The objective was to build capacity in volunteer and non-profit groups in communities facing environmental remediation and reclamation challenges.

As a teacher / professor at heart, Dr. Burgher has spent innumerable hours mentoring undergraduate and graduate students and the individuals in volunteer groups in many venues. His primary objective has always been to build capacity in people and groups so that they can help themselves, thereby eliminating dependencies. During his three years in the engineering management department at Missouri S&T, he passed on to students his enthusiasm for volunteering, working with them to complete 150 engineering work plans in nine rural Ozark communities. His and his students' efforts have led to numerous community-wide infrastructure improvements. For his commitment and dedication to these projects, Dr. Burgher won the campus's first service learning award in 2009.

The stories and examples found in this text all come from on-the-ground experiences working with volunteers and knowledge workers, in addition to the day to day idiosyncrasies of life in higher ed and on construction projects—in truth—not as different as one might think. Karl resides in the Missouri Ozarks with his wife, Lynn.

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**Michael B. Snyder, MBA, PMP**

Mike Snyder's primary expertise lies in project management. Volunteer organizations as much as any other, perhaps more, survive day in and day out through project completion. Mike has learned his skills on the ground every day working with mostly knowledge workers and in the classroom. He has both formal training and on-the-ground project management experience, an excellent and balanced combination.

For more than a decade, he has led teams and projects through to successful completion. After working in the private sector for nine years, for a Fortune 500 company, Mike joined Indiana State University's administrative staff in 2008 as project manager in the Office of Information Technology. There, he has taken on numerous technology-based responsibilities, most recently as director of enterprise services, a title he still holds. His skills include program analysis, program and project management, software development, resource management, cost benefit analysis, user and functional requirements gathering, architectural design, and documentation. He also has extensive experience in communications and leadership.

In his current role as executive director of strategic initiatives at Indiana State University, Mike works in concert with the president, the president's cabinet, and all members of the university community to successfully implement and maintain the university's strategic plan and other strategic priorities. He also manages the institutional research and business intelligence units on campus.

Mike is a highly skilled and multi-faceted project and program manager working in numerous areas across campus.

Mike earned a B.S. in computer science from Pacific Lutheran University in Washington State and his M.B.A. from Indiana State University in May of 2014. He is also a certified project management professional. Mike and his wife, Annie, reside in Terre Haute with their daughter, Allison.

Karl and Mike have worked together on many projects over the last four years together, working through the challenges of change management in a volunteer-like knowledge worker environment. They worked so closely that when Karl moved to the faculty in January of 2014 Mike seamlessly stepped right in, taking over the responsibilities associated with managing Indiana State's strategic plan.

This book is a culmination of their experiences, numerous articles they have written together for publication in professional journals, and their professional presentations and short courses.



# Acknowledgements

And here we are at the end, which in fact is another beginning. Synthesizing, thinking through one's experiences, and writing always beget more of the same. We finish one project and we start another. That has been our lives, our livelihoods. That is why it is so important to offer a few very specific and sincere acknowledgements to the primary people and organizations that have helped us along the way.

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And, we thank our parents—who imprinted us with the desire to learn, to not fear failure, to serve others, and who encouraged us to always say yes to the next challenge without hesitation. This removed our limits, leading to multiple very exciting life experiences. We have won a lot of races, a few championships, and had, of course, an occasional crash. That is a full life. It has always been without boredom and drudgery. Thank you for keeping us free.

And finally we thank our readers and all volunteers. Keep on giving—it is the only sustainable way. Thank you all for your commitment to volunteering.

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### Preface

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### More Web Resources

Career Planning at the University of Minnesota  
[http://www.morris.umn.edu/services/career/career\\_planning/valquestion.php](http://www.morris.umn.edu/services/career/career_planning/valquestion.php)



Kiersey Temperament Sorter

<http://www.keirsey.com/sorter/register.aspx>

Meyers-Briggs

<http://www.myersbriggs.org/>

<http://www.capt.org/take-mbti-assessment/mbti.htm>

Meyers-Briggs Look-A-Likes

<http://www.humanmetrics.com/cgi-win/jtypes2.asp>

Notre Dame—Work Values Inventory

[http://careercenter.nd.edu/assets/508/work\\_values\\_checklist.pdf](http://careercenter.nd.edu/assets/508/work_values_checklist.pdf)

Notre Dame—Prioritizing Your Values

[http://careercenter.nd.edu/assets/510/prioritizing\\_your\\_values2.pdf](http://careercenter.nd.edu/assets/510/prioritizing_your_values2.pdf)

Immacolata Manor New Volunteer Interest Survey

<http://survey.constantcontact.com/survey/a07e5qltqpnh03v2pp2/a014lhge3kijp/questions>

The Volunteer Guidelines for Thrift Shop Volunteering

<http://www.imanor.org/wp-content/uploads/2011/11/MTS-Volunteer-Guidelines-Jan-2011.pdf>

Experience Matters—Connecting Talent with Community

<http://experiencemattersaz.org>

Talent Application at Experience Matters

<http://experiencemattersaz.org/talent-app/>

The Work Ethic / Employability Survey Site @ the University of Georgia

<http://rhill.coe.uga.edu/workethic/>

Technology Skills Assessment

<http://www.fgcu.edu/support/techskills.html>

Indiana State University Strategic Plan Document Warehouse

<http://irt2.indstate.edu/ir/index.cfm/sp/wh/list>