

Self-Directed Volunteer Teams Webinar

February 17, 2016



Working Together



advocacy | action | answers on aging

**Aging Network Volunteer
Resource Center**

Today's Speakers



Tom Endres, Director

**Aging Network Volunteer Resource Center
National Association of Area Agencies on Aging**



Steve McCurley

**Consultant, SHIP National Technical Assistance
Center and SMP National Resource Center**



Heather Flory

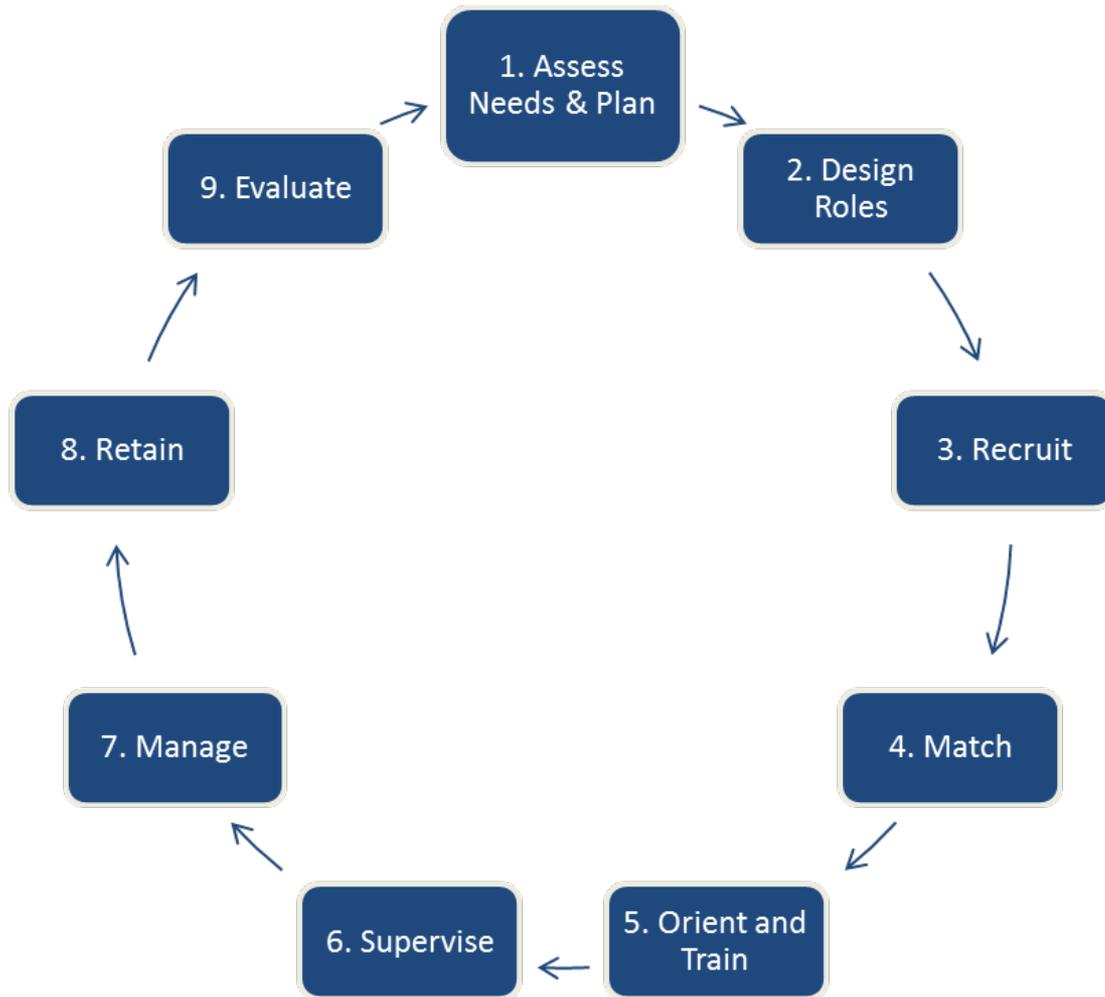
**Training Manager, SMP National Resource Center
and SHIP National Technical Assistance Center**

A Little Background: Types of Volunteer Involvement

- **Membership groups**
- **Service volunteers**
- **Project volunteers**
 - ✓ Short term
 - ✓ Leadership



Volunteer Involvement Cycle



One Key Difference: Who Manages?

Membership groups: no or little staff involvement

Service volunteers: heavy staff involvement

Project volunteers: medium staff involvement

What We'll Cover Today

The evolution of self-directed volunteer teams

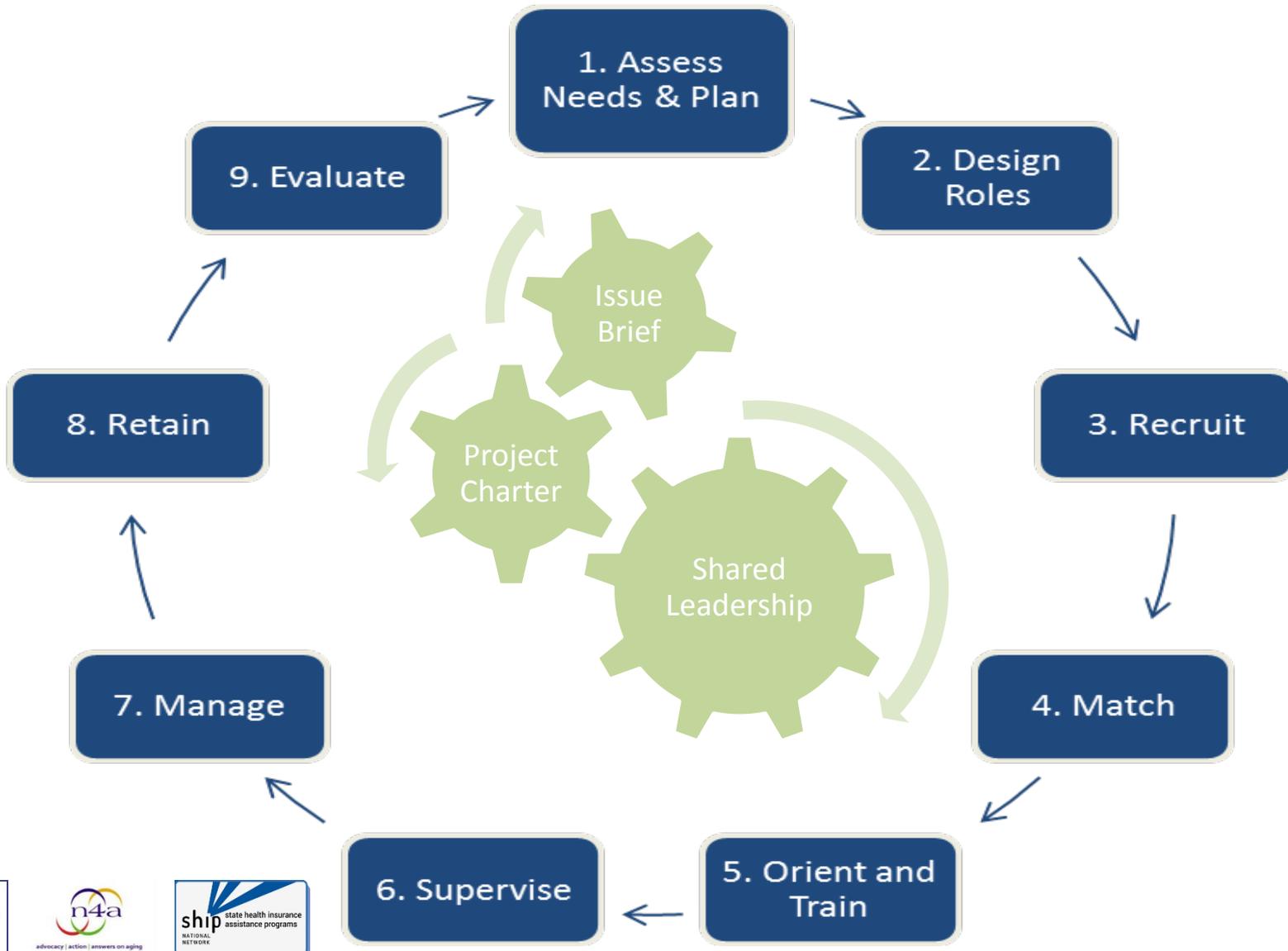
SMP/SHIP Challenges and meeting the ultimate challenge

Self-Directed Volunteer Team Definition and Background

Why SDVTs and potential outcomes and benefits

Key elements, roles and tools

Changing Paradigm



WHAT WE ARE REALLY TALKING ABOUT TODAY!



A VOLUNTEER DEVELOPMENT MODEL, SYSTEM, AND PROCESS DESIGNED TO BE POWERFULLY TRANSFORMATIVE AND CAPABLE OF TAKING PERFORMANCE TO A NEW LEVEL.

Poll 1

How many additional volunteers could your program manage with existing capacity?

a. 0 – 10

b. 11 – 20

c. 21 – 30

d. 30+

Poll 2

How many volunteers do you need to meet the anticipated increase for services in the next 3 – 5 years?

a. 0 – 10

b. 11 – 20

c. 21 – 30

d. 30+

Poll 3

What are the three most important resources you need to add an additional 50 volunteers to your program?



a. Additional volunteer directors/coordinators

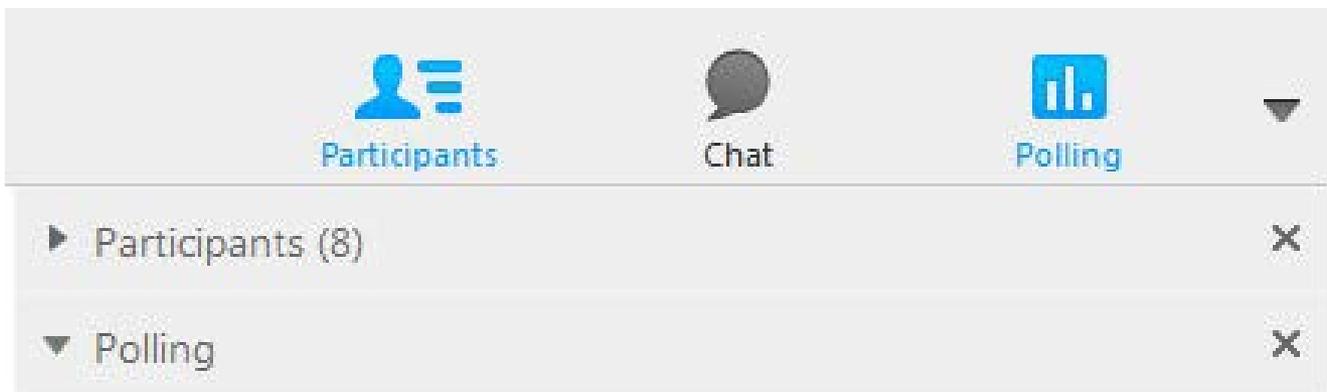
b. Increased funds for volunteer support

c. New, simplified monitoring and reporting systems

d. More managerial or supervisory staff

e. Additional staff and volunteer training and technical assistance

Now that polling has ended, click the arrows or icons to re-open your other panels as needed.



Development History

Research and
Demonstration
Activities

- 24 non-profit leader interviews
- Web survey completed by 800 non-profit senior staff
- AARP Older Adult Focus Groups
- NASUAD Survey
- n4a Survey
- 18 proof of concept sites
- 44 demonstration sites
- 6 n4a Training Institutes involving 50+ Aging CBOs
- 6 Livable Community Demonstrations
- 3 National Conference Intensives (3 Hours)
- Multiple Conference Workshops
- PA APPRISE (SHIP) Innovation Grant

Funding History

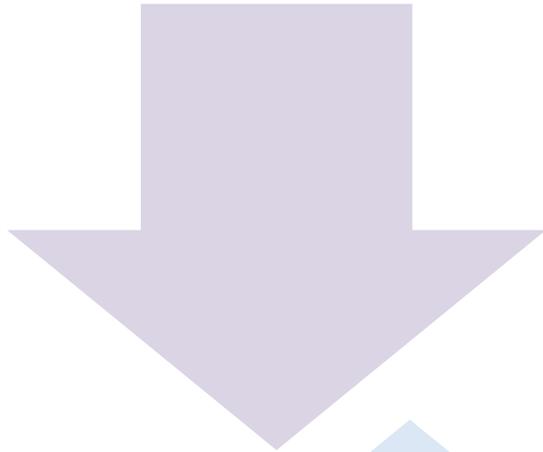
| Funding Sources | | |
|-------------------------|---------------------|----------|
| Atlantic Philanthropies | \$3 mil | 3 yrs. |
| Virginia Piper Trust | \$295 K | 2 yrs. |
| MetLife Foundation | \$250K | 3 yrs. |
| Volunteer Impact Fund | \$100K | 1 yr. |
| Admin. On Aging (NCOA) | ~\$3 mil | 2.6 yrs. |
| Admin. On Aging (n4a) | ~4 mil | 4 yrs. |
| Admin. On Comm. Liv | ~\$3 mil | 3 yrs. |
| Total: | \$13,330,000 | |

Challenges Facing SHIPs and SMPs

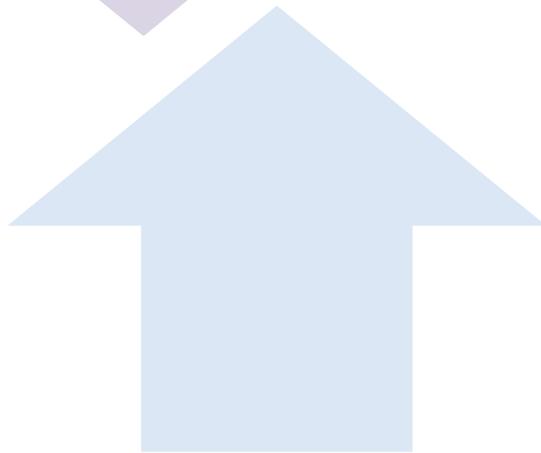
- **Gap between rising demand and funding.**
- **Finding cost-efficient ways to expanding services to:**
 - ✓ All Medicare beneficiaries,
 - ✓ All geographic areas, and to
 - ✓ A wider cultural and ethnic client population.
- **Managing volunteers is resource intensive:**
 - ✓ Adding volunteers in core SMP and SHIP roles place added burden on staff.
 - ✓ Recruiting a new diverse volunteer populations is labor intensive

Please write in additional challenges not listed above in the chat box. We will shout them out later in the presentation.

The Ultimate Challenge



Reduce the volunteer management burden on staff, and



Meet goals through quantifiable, measurable impact through cost effective and efficient means.

n4a Model Aimed at the Ultimate Challenge

New concepts are game changers:

- Teams are paramount
- Recruitment is outcome focused and issue based
- Relationship with volunteers is inter-dependent through shared leadership
- Volunteers assume ownership through empowerment
- Staff function as coaches, facilitators, liaisons, advocates



Opportunity Awaits

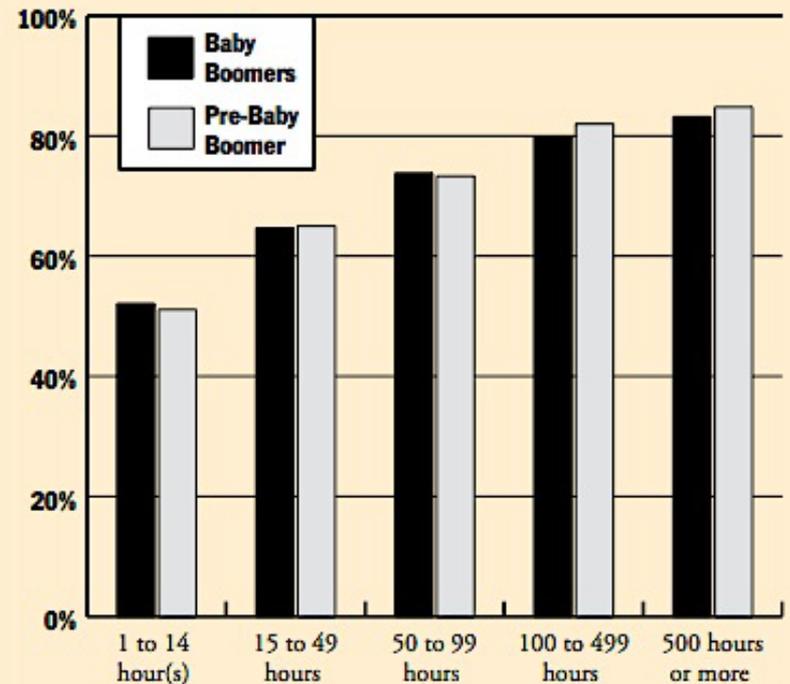
“Four in ten experienced Americans indicate they are very or somewhat likely to increase the amount of time they spend volunteering in the next five years.”

Boomers and Volunteering

Some Facts:

- Boomer retention highest (74.8%) with more challenging assignments.
- They want the opportunity to lead and have greater responsibility.
- 79% continue volunteering when they serve 12 or more weeks a year.
- 33% leave service within first 12 months due to dis-interest or dissatisfaction

Figure 3. Volunteer Retention Rates by Volunteer Hours for Baby Boomers and Older Volunteers



Source: Corporation for National and Community Service study, *Keeping Baby Boomers Volunteering: A Research Brief on Volunteer Retention and Turnover, 2007*

What is a Self-directed Team?

Definition:

Intentionally formed, outcome focused, and multi-skilled group of volunteers who share responsibilities for addressing a challenge or opportunity (such as outreach).



A self-directed volunteer team in Delaware

Over time, as it the group transitions into a team, gains experience, and works inter-dependently with the SMP or SHIP program through established ground rules, the program increasingly empowers the team to assume responsibility for its own functioning and for results.

What motivates SDVT volunteers?



Daniel Pink - Drive

Autonomy

- the desire to be self directed

Mastery

- being able to use and improve skills & knowledge

Purpose

- making a difference
Contributions will have real value

Primary Drivers of Volunteers 60+

What motivates them:

- Meaning
- Fulfillment
- Expressing passion
- Satisfying Work
- Significant relationships
- Being valued
- Healthy Activity

Sources: Drive, Daniel Pink; Younger Next Year: Live Strong, Fit, Sexy Until Your 80, by [Chris Crowley](#) and Henry S. Lodge

What they bring:

- ✓ Experience/education
- ✓ Semi-retirement/ encore careers
- ✓ Lifelong learning
- ✓ Desire to improve society by changing the system
- ✓ Impact a source of pride
- ✓ Capacity-building roles
- ✓ Sense of ownership
- ✓ Flexibility

Why Teams?

Community-based pilot and demonstration initiatives show great promise in better enabling SMPs and SHIPs to:

Meet organizational goals, particularly in the areas of outreach, resource development, and program expansion.

Reduce much of the burden of volunteer management and administration.

Add “staff equivalents” through skilled volunteers and build a rich talent pool to draw from for Board and possible staff positions.

Aid in volunteer recruitment and retention

Address issues and needs not being addressed due to lack of financial resources to support staff or operations.

Get an average 8:1 return on time and/or cash investment that keeps on giving.

SHIP and SMP Team Potential Outcomes

- ✓ Outreach to a greater number of Medicare beneficiaries
- ✓ Greater inclusion of diverse community populations
- ✓ Strengthen SHIP and SMP infrastructure as “Leadership Volunteers”
- ✓ Develop resources and serve as community ambassadors
- ✓ Recruit volunteers and increase retention
- ✓ Facilitate continuous quality improvement of volunteer initiatives.
- ✓ Serve as incubators and generators of new ideas for improving operations and developing new ways of getting things done.

With What Program Benefits?

- ✓ Improved quality, productivity and service.
- ✓ Greater flexibility for volunteers.
- ✓ Increase community awareness and support for program.
- ✓ Reduced operating costs through 8:1 ROI.
- ✓ Faster response to technological change.
- ✓ Fewer, simpler job classifications.
- ✓ Better response to workers' and volunteers' values.
- ✓ Increased employee commitment to the organization.
- ✓ Added ability to attract and retain the best people.

Tools for Team Development

Organizational Assessment Instrument

Definition of Staff and Volunteer Roles

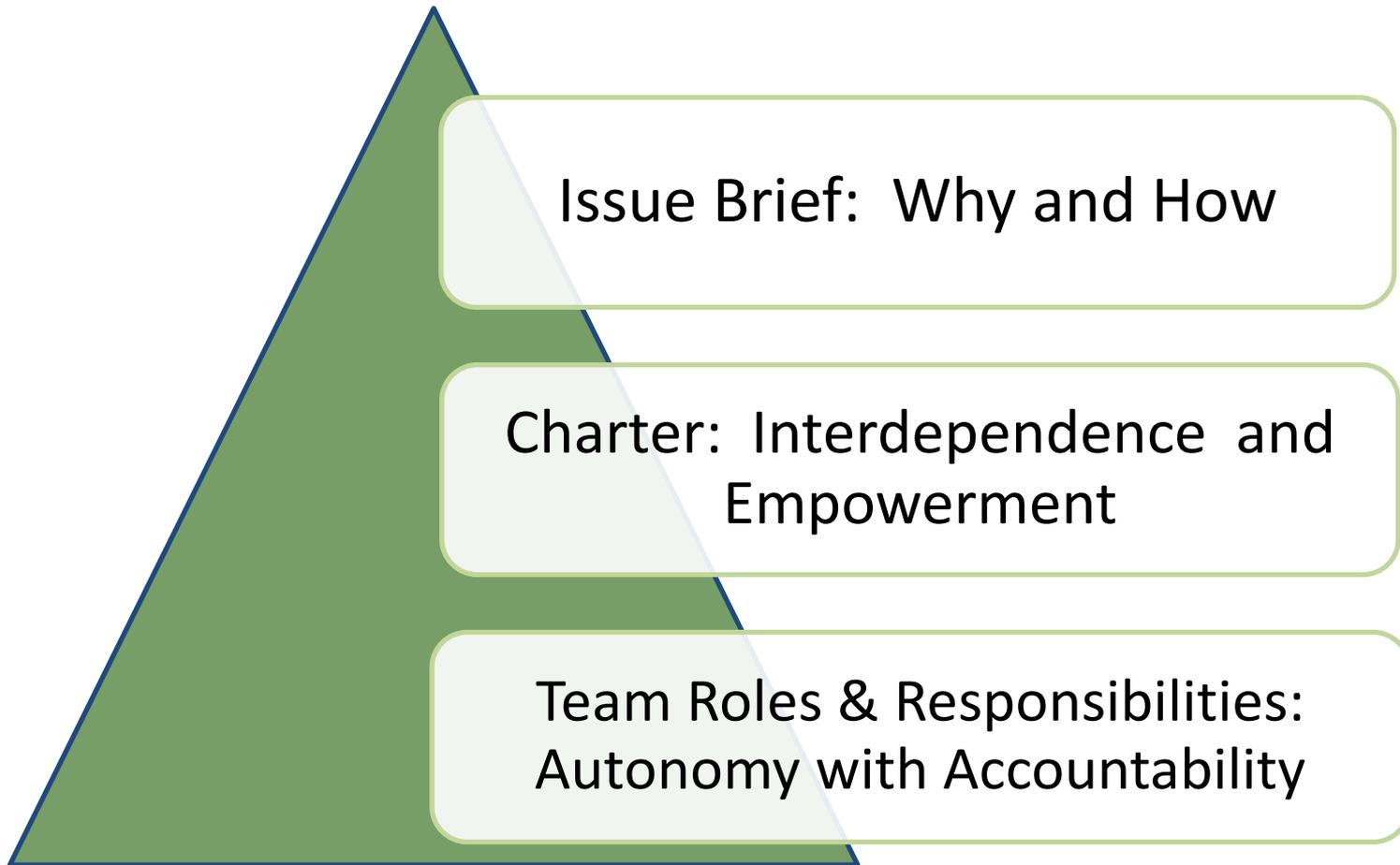
Issue Brief

Charter

Team Development and Facilitation Training

- Stages of Team Development
- Developing Ground Rules
- Share-leadership concepts and applications
- Aspects of self-direction and management

How SDVTs Align Interests!



The Issue Brief:

A clear and simple statement of vision and mission.

Purpose: The Issue Brief identifies an **issue, need, or problem** that is vital to the mission of the organization, describes its background and ramifications of not solving it.

80% Planning + 20% Doing = Highest Impact

The Charter

A written agreement between the team and the organization that establishes expectations and roles for both, and within the team itself.

A living document that can evolve as team and project progress.



...the team's goals and ground rules are also documented in the Charter.

Key Elements to Team Formation and Operation

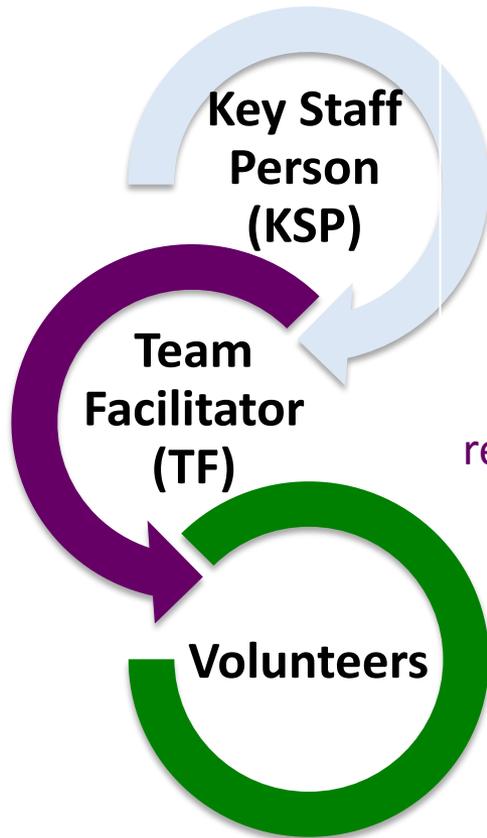
Group decision-making

Joint problem-solving

- Manageable number
- Planned interaction
- Long-term perspective
- Authority to act
- Complementary skills
- Shared Leadership
- Mutual accountability



Roles & Responsibilities



**Key Staff
Person
(KSP)**

Assigned staff member(s) who receive SDVT training and represents the agency to ensure that the team has the training, support and advocacy it needs to be successful.

**Team
Facilitator
(TF)**

Team member(s) who have received SDVT training and are responsible for facilitating the team process and coordinating with the KSP to support team progress and outcomes. Role rotates as team and project develops.

Volunteers

Volunteers make a commitment to function in a team to achieve the team and project goals.

The Value of Letting Go to Team “Self-Direction”

Self-direction reduces the amount of time-intensive support needed from initial project planning start-up through project completion.

Self-direction provides volunteers the freedom and flexibility to plan and operate through an inter-dependent relationship with the organization.

Self-direction allows the organizations to work with the team to decide what needs doing and empowers the team through leadership – not control.

Self Directed Teams at Madison Senior Center

Volunteer Recognition Team

- Identified new recognition opportunities for different cohorts.
- Replaced traditional luncheon with multiple, discounted events.
- Agreed to leadership roles with events.

Public Relations Team

- Determined a need for an internal welcome committee.
- Advise on physical space and image.
- Created new PowerPoint presentation and developed DVD promotional piece.



Program Development Team

- Interviewed multiple agencies regarding senior adult needs for programming and activities in City of Madison
- Prepared report/recommendations for policy making groups and Madison Senior Center Board

Self Directed Teams in Delaware

Who we are:

- Project Consultants for Non-profits (PCN) is a self-managed team of volunteers 60+ who assist local nonprofits with short-term projects at no cost to the nonprofit.

How it works:

- A facilitator and core team of 20 people meet bi-weekly to administer the program, decide what projects will be undertaken and assign small teams of 2 or 3 people to do the work.
- Teams assigned to projects give progress reports at the bi-weekly meetings.
- Project teams receive guidance and support from the entire team.
- Started by a staff member of a senior center. Now totally self-sufficient.

Sample projects:

- Assisted two nonprofits in getting their tax exempt status.
- Developed a policies and procedures manual for one nonprofit and a volunteer handbook for another.
- Developed a volunteer training program for a hospice.
- Conducted an assessment of the volunteer recruitment efforts of a SMP.

Greatest ROI for Volunteer Programs

Higher Levels of Responsibility

Higher Levels of Autonomy

Leadership Roles



NCOA study, *The Boomer Solution: Skilled Talent to Meet Nonprofit Needs*, National Council on Aging, 2010

n4a Resources: Self-Directed Volunteer Teams

Ageing Network Volunteer Resource Center

- <http://www.n4a.org/volunteercenter>

Self-directed Volunteer Teams Guide

- **Coming soon**

PowerUP! Concepts and Principles

- <http://agingnetworkvolunteercollaborative.org/powerup-concepts-principles/>

PowerUP Tutorial

- <http://sdvnetwork.com/sdv/poweruptutorial/>

Webinar Resources:

Today's Recording and PowerPoint Presentation

SHIPs

- Login at www.shiptacenter.org and go to: *Center Services > Events > Event Archives.*
- Or use the Search tool
 - *Tip: Enter “volunteer teams.”*

SMPs

- Login to the SMP Resource Library at www.smpresource.org.
- *Tip: Search for key words “volunteer teams.”*

Thank you for participating in today's webinar!

Up next...

Optional Q&A and Networking Session!

Q & A Session



*Reminder: If you have questions later,
SMPs, email: vrpm@smpresource.org
SHIPs, email: info@shiptacenter.org*



Networking...

Talk with your peers about ANY volunteer management topic!

To share a comment or question:

- 1) Click the pointer arrow (left side)
- 2) Click in the appropriate box below (after any other arrows)
- 3) Clear your pointer arrow when done (use the eraser drop-down arrow on the left)

Tip: If the pointer arrow doesn't work for you, click the 'raise hand' button.

SAME TOPIC

I have a comment/question about the item we are talking about now:

NEW TOPIC

I have a comment/question about a different item:

I am done talking... for now!