TRACKING
VOLUNTEER E

To avoid leaving volunteer value on the table, learn to manage your publications' volunteer relationships more comprehensively.

BY WES TROCHLIL

Ask yourself this question: In the past 12 months, how much time have you volunteered to work for Best Buy? Or maybe Sears? How about WalMart?

I suspect for most readers, the answer is "absolutely none." In reality, individuals don't spend their volunteer time with for-profit entities—they volunteer with non-profits. In fact, for most associations and nonprofits, the single greatest advantage they have over for-profits is the time and expertise they receive from their volunteers.

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Unfortunately, most associations leave a lot of volunteer value on the table by not managing these relationships comprehensively. But it doesn't have to be that way.

To be sure, most association publishers know who their volunteers are for a given activity. For example, if your association has a publications editorial board, the editor probably knows who is on that board. And she likely has an email distribution list of those members, so she can easily communicate with them. She may even have a spreadsheet or Word document that indicates which positions are held by which individuals and how long they will be on the editorial board.

But is the information collected and managed in a way that allows the organization to easily answer these questions?

- Who is on the editorial board right now?
- Who is the chair, vice chair, and past chair?
- Who are the other members?
- How long is each individual's term? Are they eligible for additional terms?
- Who was on the editorial board in years past?
- Who has expressed an interest in serving on the board in the future?

This is just a short list of questions typ-ically raised by association publishers at some point or another. If you can't easily answer these questions, you need to consider how you are managing your volunteer data. But before we address how, we should answer the question: "Why is this important?"

LEVERAGE THE VALUE OF VOLUNTEERS

As noted earlier, the single greatest advantage nonprofits have over their for-profit competitors is volunteerism. For many associations, volunteers bring untold value in the form of subject matter expertise. This expertise manifests itself
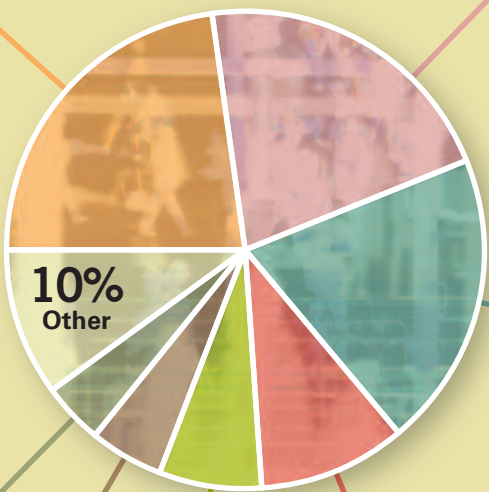
WHAT'S PLAGUING ASSOCIATIONS IN DATABASE MANAGEMENT

For the past three years, a non-scientific survey of association executives has probed the immediate concerns they have surrounding the management of their database (source: Effective Database Management). This year, nearly 150 association executives responded. Using a subjective measure, the responses fall into the following broad categories:

23% **Data collection, management, and integrity.** The truth is that your database is out-of-date now and always will be. But that doesn't mean association publishers shouldn't work to keep it as accurate as possible. Among other things, to improve data integrity, associations should be developing data integrity and exception reports, reviewing how they collect and manage data, and getting rid of data they no longer use.

21% **Implementation and upgrades.** It's critically important to keep your technology up-to-date, so this issue will be a perennial concern. To provide the best possible service to members and vendor partners, associations must keep up with the technology changes that allow them to do that.

10% Other

20% **Integration.** Issues related to integrating multiple data systems (e.g., database to content management system, database to accounting software) continue to plague associations. Lack of seamless database integration with online/web functions makes e-commerce functions bulky and unreliable. As more "best of breed" vertical software tools hit the market (think email marketing tools, certification software, job bank software), it's increasingly important for associations to use these tools. To be most effective, this will often require some level of integration between the primary AMS and the third-party software. The good news is that the software vendors are recognizing this and are working to develop standard integrations (for example, look at any major AMS vendor's website and search for "technology partners"). The bad news is that a lot of these integrations are still in their infancy, so there is still some learning to do on all sides.

4% **Training.** Issues related to learning how to use the database more effectively (or at all).

7% **User Adoption.** Getting users to actually use the database is a primary key to long-term success, and it's no surprise that some associations are struggling with that. In fact, user adoption is the number-one problem with large-scale CRM implementations. But with proper training and documentation, associations can improve the level of user adoption within their organization.

5% **Budget.** Given the current state of the economy, I'm almost surprised that this number wasn't higher. But as with all important investments, every organization has to weigh the short-term pain of spending money against the long-term potential damage of not spending that money on critical infrastructure. While there are some organizations that are in truly desperate straits, many are using the weak economy as an excuse for not making difficult but important infrastructure decisions. Those that wait will have to work that much harder to catch up once the economy turns around.

10% **Reporting and querying.** Getting data out of the database is always a concern, so I was surprised that this didn't rank higher in the responses. My hope is that part of the decline can be attributed to data management systems getting better at providing tools for querying and reporting.

in many ways, including authoring for news-letters, magazines, blogs and books; speaking at face-to-face and online events sponsored by the organization; volunteering for committee or task force work; teaching in certification courses; and much more.

In fact, it could be argued that volunteerism is exactly what associations are designed to facilitate. Thus, it is incumbent upon association publishers to ensure that their volunteers are managed well. For association publishers, knowing who your volunteers are and how they engage with your association and its various media can help leverage the value of your volunteers, thus improving the value of your entire organization and the experience for all of your members.

If your volunteers are primarily members, it's critically important that your organization identify and treat appropriately those members who are volunteers—if for no other reason than to keep them volunteering and keep them as members.

For example, for more than 15 years, I have been volunteering with a national individual membership association. My volunteering began with a single 400-word article for one of their many newsletters. Since that time, I have written an untold number of newsletter and magazine articles, spoken dozens of times at their many local and national events, and served on several volunteer committees, in multiple capacities. I have been a highly engaged volunteer for many years.

So when the time comes for a new staff member at the association to work with me, the last question the staff member should ask me is "Have you ever written an article for us in the past?" or "Have you ever spoken at one of our meetings before?" Before you ask, you'd better know who I am, and you better know how I've contributed.

It's critically important that this data is managed in a central database, and that the information is available to all publication team members who need to know.

IDENTIFY VOLUNTEER STREAMS

The question I'm often asked by associations is: "What's the best way to manage my volunteers?"

The first step to answering this question is to identify "volunteer streams." Your volunteer streams are any method by which an individual can engage at a volunteer level with your organization. Of course, this will vary among associations, but typical volunteer streams include:

- **Committee or task force service.** This would include standing committees like a board of directors, a fundraising committee, or a membership committee. It should also include ad hoc committees such as publication advisory committees, editorial review boards, event advisory committees, and task forces.
- **Speaking.** This would include speaking at any association-sponsored event, from podcasts, webinars, and online events, to face-to-face programs.
- **Teaching.** Similar to speaking, this would include faculty from any educational or certification/accreditation programs that the association sponsors.
- **Writing.** This includes your association's blogs, website, newsletters, magazines, books, or other association publications.

In addition to these common volunteer streams, many associations also track more esoteric volunteer activities, such as:

- Focus group participation.
- Room monitors or on-site registration assistance. (I've had several clients over the years that have used student and/or member volunteers to assist with onsite registration or in-room monitoring during their annual meeting.)
- Participants in research studies.
- Participants in listserve discussions.

All of these streams create lists of volunteers engaged with your organization and its publications and media. You should be tracking them actively within your database, so that you can easily identify who your volunteers are.

PROCESS AND TECHNOLOGY

Once you've identified all of your volunteer streams, the next step is to establish how you will manage all of this data.

For each data stream, identify what data elements need tracking. Continuing the example of the editorial board, typically we want to know who is on the board, what position they are serving (e.g., chair, vice chair, member), and how long their term of service is (e.g., from 1/1/2009 to 12/31/2009). We might also want to know who has served in the past and who is scheduled to serve in the future.

Typically, different data streams will require somewhat different data elements. For example, tracking volunteer writing may require tracking area of expertise, when the author was published, date of issue, etc.

Identifying what data elements will be managed is the process step. Identifying where and how this data will be managed requires technology. Most off-the-shelf association management systems (AMS) provide effective committee/task-force management functionality. Overall functionality varies, but typically an off-the-shelf AMS can provide you the ability to track committee members including positions, terms of service, and history.

This is very helpful for the committee/task force stream. But what about the other volunteer streams?

Once an association has identified the volunteer streams and the data elements to track, those using off-the-shelf software should work directly with their AMS provider to identify the best place within

NEVER ASK A MEMBER IF THEY HAVE VOLUNTEERED BEFORE—YOU SHOULD ALREADY KNOW.

the database to track the data. For example, some associations track all of their speakers within the event registration module of their AMS. This allows the association to easily query the database for all past speakers, including session titles, and is very useful for identifying potential speakers for future events.

Finally, it should be noted that tracking potential volunteers is critically important to association publishers. In some associations, members will volunteer to contribute to publications, for example, but no volunteer assignment is currently available. It's imperative that you have both the process and the technology in

place to track potential volunteers, so you can identify and communicate with them when volunteer opportunities arise within your association's publications and media.

IDENTIFYING VOLUNTEERS HOLISTICALLY

Once processes and technology are in place for managing all of your volunteer streams, your association publishing team can now "mine" that data for identifying its best volunteers and can communicate with volunteers in a way that is meaningful to them.

Were I to ask the event manager at any given association who his best volunteers are, he is likely to name people who have volunteered time for his programs, e.g., speakers. The same question posed to the publications editor will elicit names of writers. But with all of this data in a single database, the association can now identify "best volunteers" from a holistic view.

For example, if a volunteer contributed a "medium" amount of volunteerism to four different volunteer streams (e.g., committee, writing, speaking, and teaching), she may actually be more engaged than a volunteer who contributed "a lot" to just one stream. This volunteer may be the "unsung hero" of volunteers because none of her individual contributions stand out, but her collective contributions are highly valuable.

Volunteers provide untold value to your association and its publications and media. Knowing who they are, how they contribute, and what value they bring raises the explicit value of your organization, thus making it more attractive to current and future members. With the proper processes and technology in place, association publishing teams can leverage volunteers for even greater success. ■

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