



Family &  
Community  
Services

# BEST PRACTICE IN VOLUNTEER GOVERNANCE

## A rapid literature review



This Rapid Review was  
prepared for:

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Inclusion and Early Intervention Directorate**

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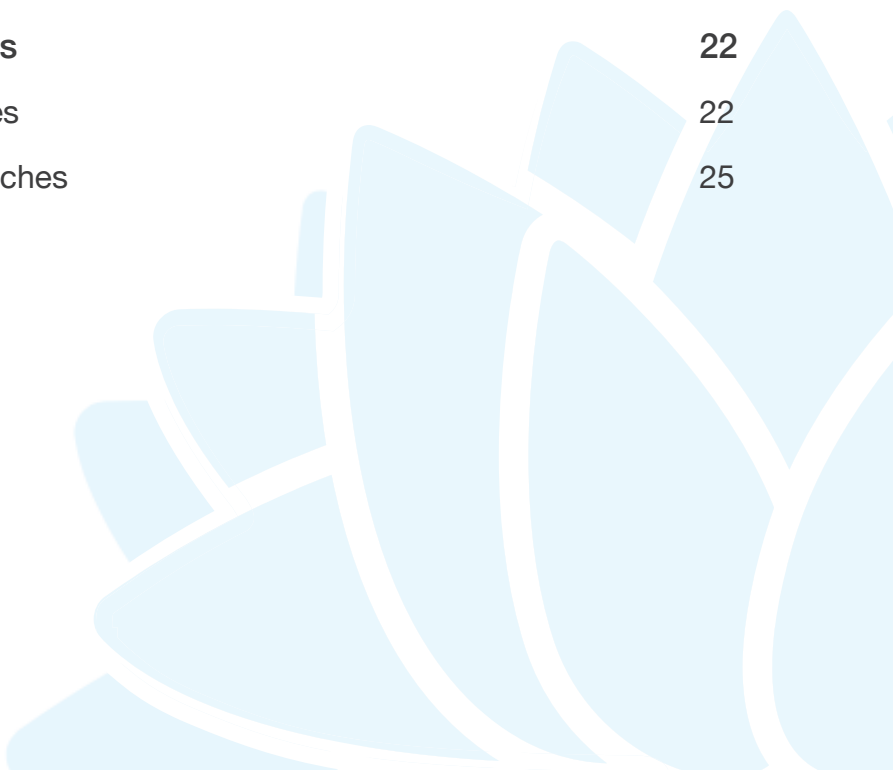
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# Executive Summary

## Aims and research questions

This rapid literature review synthesises extant research on existing models of governance of volunteers, and uses this data to formulate recommendations for best practice. The following research questions were posed:

1. What is current best practice in terms of governance of volunteer organisations? Specifically:
  - a. What are the structural/organisational elements?
  - b. What is the nature of relationships and communications with and between key stakeholders?
  - c. How do paid staff and volunteers view their own roles and contributions, and those of others?
2. What evidence-based recommendations can be derived for Australian volunteer organisations in terms of optimal governance of volunteers?

Results from this review integrate data from 38 reports/articles regarding governance of volunteers.

## Key findings

### Structural and organisational elements of effective volunteer governance

Models of governance of volunteers can be broadly classified as either 'generic' or 'context-specific' approaches. Generic approaches tend to offer a list of factors thought to relate to best practice. Alternatively, context-specific approaches recommend that governance strategies be developed in a less prescriptive way,

taking into account factors such as the type of volunteer (and their motivation for volunteering), the type of organisation, and the volunteer roles available (Brudney & Meijs, 2014).

Results of the review indicated that generic approaches share many similar themes (for example, Ellis, 2010; Ellis, 2003; Machin & Paine, 2008; UPS Foundation, 2002; Volunteering Queensland, 2017). These common factors can be grouped under themes relating to different stages of the volunteer program: *planning* and a commitment to volunteering prior to recruitment (for example, having a mission statement, budget for volunteers, conducting a needs assessment in the organisation, preparing role descriptions); *recruitment* (for example, targeting people with particular demographics or skill sets; encouraging diversity, use of marketing strategies, offering a range of flexible roles); *selection* processes (for example, ensuring fairness and equity, assessing volunteer motivations, conducting background checks, job matching, providing alternatives for those who do not 'fit' the roles currently available); *induction and training* (which may be formal or informal, in a group or one on one, and also involve paid staff working with volunteers); *supervision and support* (for example, providing volunteers with a key contact person in the organisation, communication with volunteers, clear lines of reporting); *recognising and rewarding* volunteer contributions (for example, informal 'thank-yous', recognition via newsletters or social media platforms, making volunteers visible in the workplace); *risk management* (for example, risk assessments, work health and safety guidelines, insurance); and *evaluating both volunteer performance and the program* itself (for example, provision of feedback to volunteers, exit interviews).

## Executive Summary (continued)

Context-specific approaches provide a more nuanced approach to volunteer governance, because they can account for differences according to the size of the organisation, the number of paid staff and the type of service being provided. Context-specific approaches were categorised according to whether they focused on attributes of the volunteer (for example, Brudney & Meijs, 2014; Kenny, McNevin & Hogan, 2008; Meijs & Hoogstad, 2001; Rehnborg, Bailey, Moore & Sinatra, 2009; Rochester, 2007), or attributes of the organisation (for example, Hager, 2013; Macduff, Netting & O'Connor, 2009).

Results of the review indicate that care should be taken when applying the notion of 'best practice' for volunteer governance, because the paucity of research comparing different models has hitherto hampered efforts to create a single set of standards that can be successfully applied across the board (Brudney & Meijs, 2014). Because a reliance on generic approaches alone was thought to be insufficient to account for the type of organisation, the volunteering opportunity on offer and the motivation of volunteers (either to build or use skills, or because of an affiliative desire to help the organisation), best practice is likely to involve some generic principles, modified and applied with consideration given to the factors highlighted by more flexible context-specific approaches.

### **Relationships and communications with and between stakeholders**

A dearth has been noted of available research on the relationships between different stakeholders in non-profit organisations, in terms of their needs and aims and also the governance structures which best meet these (Wellens & Jegers, 2014). However, stakeholder theory – which posits that

the organisation has a responsibility not only to their clients/customers, but to all stakeholders affected by their actions – may be a useful lens through which to view the volunteering literature on relationships between stakeholders (Wellens & Jegers, 2014). Some research suggests that a 'relationship marketing' approach (focused on the development and maintenance of strong relationships between the organisation and stakeholders) is more effective for non-profit organisations managing competing stakeholder groups than utilising a more traditional 'transactional marketing' framework (where tangible benefits are emphasised, typical of commercial organisations). The salience of particular stakeholders is thought to inform the management style adopted by the non-profit organisation (Knox & Gruar, 2007). Stakeholder salience is conceptualised a function of three factors: the stakeholder's *power* to influence the organisation; the *legitimacy* of their relationship with the organisation; and the *urgency* with which the stakeholder's concerns, demands or views require attention (Agle, Mitchell & Sonnenfeld, 1999). Stakeholders are therefore considered more salient (and thus require more managerial attention) when they wield a large amount of power, their relationship with the organisation is well established and their claims are urgent. It is suggested that more salient stakeholder relationships should be given higher priority in the non-profit organisation (Agle, Mitchell & Sonnenfeld, 1999).



## Executive Summary (continued)

Results reveal that organisations tend to be perceived as more effective when they utilise consistent and well-articulated rationales and values to deal with the various stakeholders (Balsler & McClusky, 2005). This would be expected to reduce problems associated with stakeholders holding conflicting views regarding the organisation's mission and values. By referring to the mission and core values in communications with all stakeholder groups, ambiguity is reduced. Thus, consistent adherence to a mission or core value statement and cultivating positive stakeholder relationships are seen to go hand in hand. Furthermore, cultivating strong relationships between stakeholders enables problems to be identified and addressed at an early stage. These factors are seen as integral to the success of non-profit organisations (Balsler & McClusky, 2005).

### **Perceived roles and contributions of volunteers and paid staff**

The notion of 'psychological contracts' has been highlighted as a core factor impacting the relationships between paid staff and volunteers and perceptions of roles in them (Netting, Nelson, Borders & Huber, 2004). Psychological contracts denote a reciprocal relationship based largely on *trust* between the volunteer and the organisation, and *expectations* the volunteer has about rewards for their involvement (Netting, O'Connor, Thomas & Yancey, 2005).

Research from the perspective of psychological contracts indicates that both the relational dimensions (social/emotional factors such as trust, loyalty, sense of community) and value-based dimensions (motivated by an affinity for the cause or principle) are particularly relevant for the

retention of volunteers (Stirling, Kilpatrick & Orpin, 2011; Vantilborgh et al., 2012). Thus, governance models that focus on embedding volunteers in the social environment and making them feel like a valued part of the organisation (for example, social gatherings, recognition in newsletters and networking) may not only reduce conflict between volunteers and paid staff, but may also result in greater retention of volunteers. From the perspective of paid staff, negative experiences with volunteers have been associated with higher work stress and workload, suggesting that a lack of time/resources and greater job demands produce more negative attitudes of staff toward volunteers (Rogelberg et al., 2010).

Differences in motivations help to explain conflictual staff–volunteer relationships, because these may translate to conflicting ideas about roles, rewards and goals (Netting et al., 2004). Volunteers tend to report being motivated by psychological rewards, such as social interaction and service to others. While paid staff were primarily motivated by autonomy needs, relatedness needs were the strongest predictor of satisfaction among volunteers (Boezeman & Ellemers, 2009). Other factors positively influencing volunteer satisfaction include perceived organisational support (being given educational and emotional resources to fulfil their role); perceived empowerment (freedom to define aspects of their role); participation efficacy (the belief that the work being done is of benefit); and social group integration (the relationships between volunteers and staff). Conversely, sources of conflict between paid staff and volunteers often involved confusion, ambiguity or conflict between roles (Volunteering Australia, 2006). Tensions and

## Executive Summary (continued)

conflict between paid staff and volunteers may arise when volunteers are seen as a threat to paid positions; lines of responsibility are blurred or not defined; paid staff do not accept or appreciate the role of volunteers; and when paid staff have no input into the program. In terms of volunteer qualities, tensions may also arise if volunteers overstep their roles or resist support and/or supervision from paid staff.

Evidence from Australian research on bullying suggests that the power dynamic does not necessarily always work in favour of managers or paid staff, but that volunteers can at times exploit their power too, and engage in upward or horizontal bullying (Paull & Omari, 2015). This should be considered when developing processes for dispute resolution.

## Recommendations

Based on the research and evaluations reviewed, evidence-based recommendations for volunteer governance include:

1. Ensure the key aspects of effective volunteer governance are included in any volunteer management framework. Based on the literature reviewed, these elements include planning, recruitment and selection, induction and training, supervision and support, recognition and rewards, risk management and program evaluation and review.
2. Customise the features of the governance framework to be appropriate for individual volunteer programs, taking into consideration factors associated with the volunteers, characteristics of the organisation and the context in which it operates.
3. Communicate clearly and consistently with key stakeholders to ensure perceptions of the organisation's mission are aligned, positive relationships are developed between stakeholders and conflict is minimised.
4. Develop strong affiliations between volunteers and the organisation by emphasising the importance of the mission and making volunteers feel valued and involved.
5. Implement management practices that emphasise and prioritise the relational and value-based dimensions of volunteers' psychological contract.
6. Provide volunteer opportunities that cater for individuals' time availability, including offering a range of roles that vary in terms of how much, when and how often time is required.
7. Consider paid staff in developing the volunteer governance framework, including appropriate management practices and opportunities to develop positive relationships with volunteers.
8. Ensure volunteers feel empowered to express their opinion and feel like their voice is heard, by providing opportunities for input into decision making and acting on this input.
9. Implement mechanisms that build positive relationships and minimise conflict between volunteers and paid staff, including involving paid staff from the very start of the volunteer planning process, and rewarding paid staff for supporting volunteers.
10. Prioritise stakeholders that are important and can provide maximum benefit to the organisation, and set up governance structures that enable the organisation to be appropriately responsive and attentive to the most salient stakeholders.



# 1. Introduction

Volunteers serve important functions in many Australian organisations. Data indicate that rates of volunteering are high, with approximately 5.8 million Australians volunteering approximately 743 million hours in 2014 (Australian Bureau of Statistics, 2015). However, to continue to harness and grow the generous contribution made by Australian volunteers each year, non-profit organisations need information regarding the best methods of planning for, attracting and retaining volunteers. Thus, an understanding of effective governance models, to guide the design and development of organisation-specific volunteer programs, may be useful to such organisations (Brudney & Meijs, 2014; Machin & Paine, 2008; Volunteering Australia, 2015). The ability to maintain and build the volunteer workforce is enhanced by insight into how volunteers perceive their own roles and the extent to which they feel a connection with the organisation and its cause. Problematic relationships between volunteers and other stakeholders contribute to higher levels of turnover of both volunteers and paid staff (Rogelberg et al., 2010), so management practices that effectively enhance communication and relationships between these parties offer significant benefits to volunteer organisations.

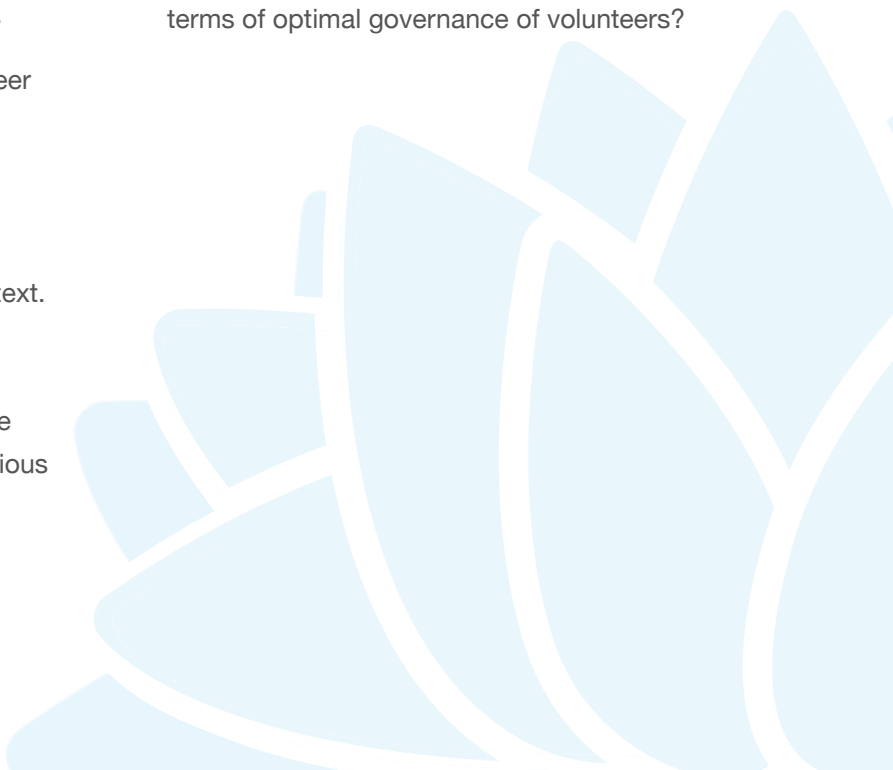
While much of the literature addresses volunteer management in a general sense, the concept of 'best practice' in volunteer governance has remained elusive, largely due to a lack of systematic research comparing the various approaches, particularly in the Australian context. Furthermore, organisational heterogeneity makes pinning down best practice guidelines difficult (Brudney & Meijs, 2014). Despite these difficulties, there is a need to integrate the various

disparate pieces of evidence to provide clear and comprehensive evidence-based guidelines to inform governance of volunteers in Australian organisations that utilise volunteers.

## 1.1 – Aims

The aim of the rapid literature review is to provide a review and set of evidence-based recommendations regarding best practice in governance of volunteer organisations. In order to achieve this, the following research questions were posed:

1. What is current best practice in terms of governance of volunteer organisations? Specifically:
  - a. What are the structural/organisational elements?
  - b. What is the nature of relationships and communications with and between key stakeholders?
  - c. How do paid staff and volunteers view their own roles and contributions, and those of others?
2. What evidence-based recommendations can be derived for Australian volunteer organisations in terms of optimal governance of volunteers?



## 1. Introduction (continued)

### 1.2 – Method

#### 1.2.1 – Rapid review

The project utilised a rapid review methodology in order to provide a brief but in-depth analysis of research on governance of volunteers. Rapid reviews aim to streamline traditional systematic review methods and synthesise evidence in a short timeframe. This is achieved by introducing restrictions at the literature search and data extraction stages. These strategies can include limitations on the number of electronic databases searched, date and language of publication, and searches of unpublished or grey literature. When compared, rapid reviews have been found to generate overall conclusions which are not significantly different from those of traditional systematic reviews (Watt et al., 2008). Unlike traditional systematic reviews, which provide an exhaustive synthesis of all data available, rapid reviews produce a succinct, usable and highly targeted synthesis of research in a shorter timeframe (Ganann, Ciliska & Thomas, 2010).

#### 1.2.2 – Search strategy

The search strategy employed academic databases (for example, PsychINFO, ABI/INFORM, ProQuest) and was augmented with grey literature identified via search engines (for example, Google Scholar) and searches of known Australian and international websites with relevant data (for example, Volunteering Australia, The Centre for Volunteering, Volunteering Queensland). Reference lists of the included articles/reports were also scanned to retrieve omitted literature with relevance to the research questions. Keywords

included, but were not limited to, combinations of the following:

- volunteer, volunteering, philanthropy
- governance, organisation, structure, framework, system, management
- communication, marketing, message
- role, relationship
- efficacy, effectiveness, evaluation, outcome.

#### 1.2.3 – Inclusion and exclusion

Research questions 1(a), (b) and (c) initially focused on literature published from 2010–17, but a small number of usable documents retrieved, particularly those relevant to research question 1(a), signalled the need to expand the search timeframe. Thus, relevant articles and documents from 2000 onwards are included. Exceptions were made for research pre-2000 if: (1) the article/document provided insight or context important for understanding subsequent studies which were included in the review, or (2) it was included as a seminal part of a recent systematic review identified as part of the search.

No additional search was conducted for research question 2, because it was designed to draw implications and recommendations from research identified and reviewed as part of research question 1.

The review included both academic and grey literature from Australia and also international literature. However, articles containing Australian data were prioritised over those from international sources. Where possible, attempts were made to identify research comparing the effectiveness of different models of governance, but research in this area was particularly scarce.

## 1. Introduction (continued)

Excluded articles were those deemed low relevance to the research questions (for example, literature about the phenomenon of volunteering more generally), editorials, opinion pieces, commentaries and literature published prior to 2000. Research with robust methodology (for example, systematic reviews) were prioritised over research utilising less rigorous methodology (for example, cross-sectional designs, convenience samples). However, much of the literature pertaining to question 1(a) was found to be conceptual in nature (regarding models of governance), so a number of conceptual reviews are included.

The search strategy yielded 38 items for inclusion in the rapid review, many of which were literature reviews, and thus included summary statistics or conceptual data from multiple sources.

### 1.2.4 – Report structure

This review is structured in accordance with the aims and research questions posed. Models of governance of volunteers are considered first, and relationships with and communication between stakeholders involved in volunteering governance next. This is followed by review of literature pertaining to perceived roles of volunteers and paid staff, and recommendations for governance of volunteers are considered last. Where possible, brief critiques of the empirical studies are also included, to allow consideration of the weight of evidence.

## 2. Structural and organisational elements of effective volunteer governance

Brudney and Meijs (2014) provide a narrative literature review to identify and evaluate models of volunteer management. They note the paucity of research examining best practice for volunteering management and governance, and suggest that this has hampered attempts to empirically evaluate volunteering opportunities. They also note that the notion of ‘best practice’ assumes that a single model of volunteer administration and management will be suitable for all types of organisations. According to Brudney and Meijs (2014), this ‘generic approach’ to volunteer management is incapable of capturing the nuances of the types of organisations and volunteering work available. Volunteering activities tend to differ according to the context in which they occur. Thus, approaches should be adapted to account for differences according to sector, organisation and volunteering opportunities offered – a ‘context-specific approach’ to volunteering governance. For the purpose of this rapid review, and to facilitate ease of understanding for the lay reader, more descriptive names will be used for these two approaches. ‘Universal’ approaches to volunteer governance are instead referred to as ‘generic’ approaches, and ‘context-specific’ approaches are instead referred to as ‘context-specific’ approaches.

### 2.1 – Generic approaches

A range of models have been proposed that outline the generic elements of volunteer management programs that constitute ‘best practice’. One of the first to do this was Ellis (2003), who offered 12 essential features of an effective volunteer governance framework:

1. **Planning and resources:** this element is concerned with planning and preparation of resources for volunteers, and includes defining goals/objectives, resources and budgeting, preparation of staff, and a plan for implementation of the volunteer program.
2. **Staffing:** under this framework, volunteers are viewed as ‘part-time staff’, so having a designated coordinator for volunteers and activities they undertake is recommended.
3. **Volunteer work design:** undertaking a needs analysis in the organisation to ascertain which tasks require volunteers and where volunteers can fit in the organisation is important. Further, creatively designing multiple tasks which can be done in short time periods may suit volunteers with limited or sporadic time availabilities. The volunteers’ roles, in terms of expectations of them and the qualifications required to perform particular tasks, should be put in writing.
4. **Recruitment:** recruitment activities should be linked to marketing strategies and public relations efforts to ensure consistency in message, and should be supported by the organisation as a whole.
5. **Interviewing/screening:** this is important to assess the appropriateness of the match between volunteers and roles, and can prevent management problems down the track. This can also be used to identify what types of roles are appealing to each individual, thereby contributing to increased volunteer satisfaction.

## 2. Structural and organisational elements of effective volunteer governance (continued)

6. **Orientation/training:** this allows volunteers to view their work in the context of the rest of the organisation, and provides an introduction to organisation-specific policies and procedures. Training should start with general induction; but following this, training should be specialised to the tasks and responsibilities the volunteer is expected to fulfil. Ongoing in-service training/supervision is also recommended.
  7. **Relationships between paid staff and volunteers:** tensions between paid staff and volunteers are highlighted as the single biggest challenge when managing volunteers. An atmosphere that encourages teamwork is thought to be beneficial, and attention should also be paid to relationships between volunteers (for example, long-time volunteers versus those just starting), because this can also be volatile.
  8. **Supervision:** a key recommendation is that volunteers always have access to someone who is in charge while they are on duty. However, some more skilled/experienced volunteers may require less frequent connections.
  9. **Recognition:** both thanking volunteers and welcoming their input are important, and this can be done formally (for example, certificates, special dinners or events in recognition of efforts) or informally (for example, daily words of support, expressions of thanks). Both occasional formal and frequent informal recognition of volunteers are equally important.
  10. **Record keeping and reporting:** in order to know what volunteers are doing and to map achievements and completion of tasks, records should be kept, and achievements may even be reported back to volunteers as a form of recognition. Reports/records are also important for insurance and tax-deduction purposes.
  11. **Evaluation of the impact of volunteers in the organisation:** this allows assessment of whether resources are being used optimally. Smaller-scale, individual evaluations and feedback for volunteers may also be helpful and promote a sense of recognition for volunteers' contributions.
  12. **Volunteer input:** creating channel for volunteers to provide feedback on the organisation and its performance is important so that volunteers have a sense of participation and a feeling that their voice is being heard (adapted from Ellis, 2003).
- More recently, in their narrative literature review, Brudney and Meijs (2014) identify and describe three different generic volunteer management models, all which offer similar lists of features in terms of effective volunteer governance: Ellis's updated model (2010), the UPS Foundation model (2002) and Machin and Paine's model (Machin & Paine, 2008).
- Following her original (2003) model, Ellis later updated and condensed her detailed model to cover nine general areas regarding all areas of volunteer involvement (2010). These include planning-stage functions (planning and administration, volunteer work design); selection and preparation of volunteers for their role (recruitment strategies, interviewing/screening procedures, training and orientation); management of volunteers as they fulfil their role (supervision and support, ongoing recognition/motivational strategies); and evaluation of the success of the program (impact evaluation, records and reporting). One additional category – 'other responsibilities applicable to the organisation' – was proposed to allow organisations to tailor their approach to their needs; however, Brudney and

## 2. Structural and organisational elements of effective volunteer governance (continued)

Meijs (2014) highlight that the overly prescriptive nature of the list of actions under this heading mean that it still represents a generic rather than context-specific approach.

The UPS Foundation model (2002) is conceptually similar to Ellis's work, and includes policies/ program development, management and program evaluation; however, it adds extra detail at each level. For example, the planning stage includes a written statement of the philosophy of volunteer involvement, written position descriptions of roles for volunteers, budgets for volunteer expenses and so on. Periodic assessments of volunteer performance are recommended, as are assessments of support staff – including a volunteer manager or leader to oversee all volunteer activities in the organisation from the top down.

The UPS model also includes a checklist comprising 23 elements of effective volunteer management. These include periodic assessments of volunteer performance and staff support for volunteers, regular sharing of information regarding volunteer involvement with key stakeholders and linking volunteer involvement to organisational outcomes. The model recommends continual recruitment of new volunteers, which may make it particularly suitable for programs involving short-term volunteering activities. However, a limitation of this approach in terms of its feasibility may be the resources required to achieve this. Smaller organisations with few financial resources may have difficulty integrating management of volunteers into staff responsibilities, and/or may not be in a financial position to employ someone specifically for this type of role. A customised governance system for these types of organisations may be more appropriate.

The third generic approach reviewed, the Machin and Paine model (2008), proposes nine indicators of quality for organisations involving volunteers:

1. Commitment to the notion that volunteering is a two-way process that benefits both the organisation and the volunteer.
2. Appropriate resources (for example, time, money, staff time, materials, support) are allocated to the volunteering program.
3. Opportunities are given to volunteers who reflect the diversity of the local community.
4. Roles/responsibilities are appropriate for organisational aims/objectives, and are also perceived as valuable to the volunteers themselves.
5. Volunteers are protected as much as possible from any potential physical, financial or emotional harm that may result from their volunteering.
6. Recruitment procedures are fair and consistent.
7. New volunteers are introduced/inducted into their role and the organisation/staff they will work with, and there are clear procedures for this process.
8. The different support needs of volunteers are understood and accounted for.
9. The need to recognise volunteers is understood throughout the organisation as a whole.



## 2. Structural and organisational elements of effective volunteer governance (continued)

Literature from Singapore also provides other examples of checklists and guidelines for volunteer involvement. As part of its manual for best practice in volunteer management (2012), the National Volunteer and Philanthropy Centre (NVPC) developed a checklist (2015) organised according to the stages of a volunteer's involvement.

Within the *concept* stage the organisation should be concerned with:

- defining the vision, mission and objectives in relation to volunteers
- assessing the organisation's needs in terms of volunteers
- designing a budget to accommodate these needs.

This is similar to Ellis's (2003) first element of volunteer management described earlier. However, the NVPC manual provides additional detail at each level of the concept stage. More specifically, a mission statement for volunteer management should be developed with input from a variety of stakeholders, including paid staff. This is followed up with: coaching sessions (for all stakeholders) to clearly communicate the mission statement; prominently displaying the mission statement in the workplace; providing a copy of the mission statement to all employees in the organisation; and encouraging leaders in the organisation (for example, managers) to uphold this mission statement, and the philosophy behind it, at all times. It is recommended that mission statements be concise and easy to understand (using minimal jargon), and that they clearly explain why volunteers are an important part of the organisation.

When conducting a needs assessment for the organisation, a survey of current management and staff may be useful. An in-house 'volunteer needs' survey is recommended in order to identify areas where volunteers can potentially fill gaps or enhance service delivery. This is recommended as a starting point, with follow-up interviews as the next step. In addition to identifying areas of need, important aspects to assess include the ability of the organisation to attract, retain and manage volunteers. This stage is also important to help define roles that might be offered to volunteers, to ensure appropriate matching of volunteer skills to roles. Also, the nature of volunteer assignments – either ongoing or short term – should be defined at this stage, and budgeted for accordingly. The organisation should also plan spaces for the volunteers to work and any resources they may need (for example, office equipment, storage spaces, bulletin boards, parking arrangements, identity tags).

The *planning* stage involves four elements:

1. developing policies, procedures and job descriptions (for example, terms of appointment, orientation programs, strategies to retain volunteers such as conflict resolution procedures; feedback channels; codes of conduct/ethics)
2. recruitment of volunteers (for example, targeted messaging for particular types of volunteers; media coverage, informal talks; special brochures/letters, contacting interested potential volunteers immediately; using existing volunteers to create testimonies that help to recruit new ones)

## 2. Structural and organisational elements of effective volunteer governance (continued)

3. record keeping (for example, time log/ attendance sheets, databases featuring personal particulars, work assignments, training, reviews/evaluations conducted, awards/recognition and other information that may be relevant)
  4. risk management (for example, insurance coverage; formalised risk management practices detailing agreements between parties and duties).
4. recognition/retention of volunteers (for example: using both formal and informal means such as personal notes; SMSs, recognition programs or other actions that might be considered meaningful for that particular person; providing personal growth opportunities; emphasising career enhancement so volunteers can see how their role increases their market value as an employee; encouraging the development of friendships in the organisation).

The *implementation* stage features four elements for organisations to consider:

1. screening, interviewing and placement (for example, application forms, interviews, interview follow-up, interview assessment forms, placement of volunteers into appropriately matched roles, or offering alternatives for volunteers for whom there may be no role currently)
2. orientation/training (for example, welcome letter, initial orientation session followed by specific training for that particular role; individual one-on-one orientation sessions; ongoing checks to ensure volunteers have necessary support)
3. supervision (for example, providing leadership/ support on a case-by-case basis and according to situation, fostering a close relationship with volunteers, selecting leadership style to match volunteer needs)

Finally, the *review* stage is comprised of two components: **(1)** evaluation of volunteer performance, and **(2)** evaluation of the program as a whole. Regular appraisals should be arranged as part of the role. Volunteers should be made aware of this at the outset, and these should take the form of one-on-one meetings with volunteers. An exit survey for volunteers should be developed to gain feedback on the program itself and identify problems that may exist from the volunteers' perspectives. Although the guidelines and checklist were both developed for use in Singapore, they were specifically developed to apply to volunteering in the non-profit context, and thus have high relevance for Australian volunteering. The specificity of the guidelines, and the organisation of the stages (from planning prior to volunteer involvement through to the point at which they exit the organisation) provides a useful model from which to draw best practice recommendations.

## 2. Structural and organisational elements of effective volunteer governance (continued)

Checklists for volunteer management have also been developed specifically for the Australian context. Volunteering Queensland (2017) created an action plan checklist for organisations to use to effectively manage volunteers. This checklist is organised using seven themes, operationalised and expanded to cover key points of action necessary to create a volunteer governance structure that works for that particular organisation. In this sense, the generic principles may be used as a guide and tailored to the specific needs of the organisation. The seven themes are similar to those gleaned from other generic frameworks:

1. **Implementing volunteer policies and practices:** development and implementation of a general policy statement for volunteer involvement, definition of volunteers rights and communication of these rights to volunteers.
2. **Identifying and defining volunteer opportunities:** detecting gaps in the management/administration of key business areas (for example, information technology, sales, human resources, administration) and assessing whether some gaps could effectively be filled by volunteers.
3. **Recruitment, selection and orientation of volunteers:** numerous recommendations are listed, including having in place policies for standardising and documenting recruitment, selection and orientation practices. Planning should occur prior to recruitment (for example, roles/positions available, optimal numbers of volunteers to be recruited, selection criteria, alternative options for those who apply in case current options do not suit them, aligning options with volunteers skills/interests). Selection procedures should include acknowledgement of inquiries, followed

by initial screening, and then reviewing of applications in more depth. Police or other checks necessary for the role should then be completed. Orientation should then occur shortly after or prior to a volunteer starting their role, and information given as part of orientation should cover the organisation's policies and procedures (for example, work health and safety policies), a mission statement outlining the values and aims of the organisation, expectations and accountabilities of volunteers, and possibly a guided tour of the workplace.

4. **Work and the workplace:** this section covers volunteer roles, volunteer involvement and risk management. In terms of their roles, it is recommended that volunteers be given clear responsibilities (not just a list of tasks), and tasks that are meaningful, rather than just work to keep them busy. Roles should be defined, documented and up to date with job descriptions covering the expectations around responsibilities, accountability and supervisors. Clear communication with volunteers regarding how the work they are doing fits in with the goals of the organisation as a whole, and provision of appropriate on-the-job support so they can achieve goals are also essential, and attendance records were recommended to document volunteers' contributions. Volunteers should also feel involved in the organisation, which can be achieved through open communication channels, involving volunteers in decision making, offering opportunities to meet and discuss feedback or concerns volunteers may have and collecting and analysing information on volunteer satisfaction and any challenges they face. Finally, risk management should be considered, including safety of facilities, provision of resources and grievance policies and procedures.

## 2. Structural and organisational elements of effective volunteer governance (continued)

5. **Service delivery and performance:** this includes the need to monitor and maintain standards of volunteer service delivery, review performance of volunteers and provide regular feedback, document this feedback and informal and/or formal recognition of good performance.
6. **Training and development:** training of volunteers is important to ensure their strengths, needs and aspirations are met, and on-the-job learning should be encouraged by ‘buddying’ with other volunteers or ‘mentoring’ with paid staff, team work tasks and meetings.
7. **Documentation:** emergency contacts and other details for volunteers in a secure/confidential storage place, and a database for volunteers may be developed to track numbers of volunteers, duration of involvement and any training and development undertaken (adapted from Volunteering Queensland, 2017).

The UK National Health Service (NHS) estimates that three million people volunteer in health and care across the UK across a variety of roles. For this reason, extensive guidelines for management of volunteers under the NHS framework have been developed, covering a range of criteria for best practice. While it is beyond the scope of this rapid review to report every aspect covered in this document (NHS England, 2017), a number of key points can be generated which can be used to inform best practice for governance of volunteers. First, the organisation must *commit to volunteering* as part of its core business. This involves:

- adopting a vision for volunteering, which is developed and/or endorsed by the board, and which sets out volunteer involvement in the organisation

- development of a plan for communicating commitment, so all in the organisation understand the role and value of volunteers in the organisation – this should be communicated to all stakeholders (including patients)
- a monitoring and review process for this vision, to check that this is being implemented and volunteering is being effectively integrated into the organisational zeitgeist.

Next, a *volunteering framework* should be created, involving specific plans and processes. This should encompass the following elements:

- a budget for volunteering activities and resources, as well as staff costs if staff are to be involved in managing volunteers
- plans and strategic objectives of the volunteering program
- a clear management structure for volunteers, with a staff member assigned to coordinate and manage volunteers
- support for any staff who will be working with volunteers, including training and induction around volunteer policies and procedures, as well as materials and resources developed for them.

It is also noted that volunteering programs should be as *inclusive* as possible, because diversity in volunteer backgrounds and skills can help the organisation reach a wider range of people, promote trust in the community and ultimately improve services by allowing a wider

## 2. Structural and organisational elements of effective volunteer governance (continued)

range of voices to be heard. In order to promote inclusiveness, the volunteer program should:

- have policies and procedures specifically addressing diversity in the volunteering workforce
- provide information that is accessible to a diverse range of potential volunteers (for example, providing information in a number of different formats, and adapting materials to suit needs of diverse populations)
- take a person-centred approach to recruitment, focusing on how to best support people to become engaged in volunteering, and carving roles to individual needs
- work with other local organisations and partners (for example, charities), particularly those who cater to the types of people being targeted

Consistent with other approaches (for example, Ellis, 2003; Volunteering Queensland, 2017), the NHS framework focuses on the development of *volunteer roles* which are meaningful, clear and well described and communicated. Key points to ensure best practice include:

- providing meaningful roles that are beneficial to the organisation and the volunteers themselves
- taking an ‘asset-based’ approach, to carve roles according to the unique experiences, strengths and skills of the individual
- task and role descriptions for each role, providing detailed information, but avoiding terminology that suggests an employment relationship. Rather, a focus on mutually agreed-upon expectations and benefits for the volunteer as well as the organisation are recommended
- a list of qualities, skills and qualifications (if necessary) that are required for the role

- an acknowledgment and communication of any risks associated with the role (for example, psychological distress) and measures that will be taken to prevent any harm occurring
- a variety of flexible volunteer roles to meet a range of needs, abilities and interests of volunteers.

*Safeguarding volunteers, staff and service users* is also covered in the NHS framework. Methods of achieving this include:

- conducting a risk assessment for each volunteer role
- development and implementation of a policy for dealing with children and other vulnerable populations
- a whistleblowing policy so volunteers can raise concerns about care
- induction and training of volunteers
- insurance for volunteers undertaking their activities (for example, employer liability and public liability insurance)
- criminal record and other relevant checks.

Guidance on *attracting and recruiting volunteers* is also provided in this NHS framework, and emphasises many of the same principles and processes included in the other frameworks. It is recommended that organisations have:

- recruitment pack and information that is accessible and available in multiple media formats (for example, other languages, online, in print)
- a communication and recruitment plan that details how to reach the desired audience
- pre-application information so volunteers can find out details of different roles before they formally apply

## 2. Structural and organisational elements of effective volunteer governance (continued)

- an application form as part of the recruitment pack, that includes questions about motivations for volunteering, times availability, specific work interests, and so on
- selection and matching of volunteer to role to enhance satisfaction and the volunteer's ability to effectively take on the role
- interviews, using either formal or informal structures, ensuring volunteers are given time to talk about themselves and what they would like to get out of volunteering
- references for volunteers so an independent perspective of volunteer skills can be obtained
- safe and secure storage of all information about volunteers.

Recommendations relating to *inducting and training volunteers* include:

- provision of a volunteer handbook at induction
- being flexible about the timing of induction sessions
- provision of training relevant to volunteers' roles
- allocation of an adequate budget for training of volunteers

The NHS guidelines also make recommendations regarding *supporting and supervising volunteers*.

These include:

- provision of a named contact for volunteers
- understanding volunteers' motivations and that these can change over time
- ongoing supervision and support that is flexible and as needed, according to the individual's role
- clear feedback procedures and opportunities to discuss any experiences that are negative or concerning

- staying in communication with volunteers, utilising multiple methods (for example, phone calls, noticeboards, newsletters, social media).

Another important aspect of the NHS guidelines pertains to the *recognition of volunteers'* contributions to the organisation. In line with literature reviewed previously, making volunteer contributions visible is considered highly important, with recommendations including:

- using existing channels (for example, workplace newsletters, posters) to promote the achievements of volunteers, and sharing stories/case studies about the contribution of individual volunteers
- make volunteers more visible (for example, by giving them lanyards or badges to wear in the workplace)
- recognising achievements using awards for contributions over time or for special achievements, as well as less formal or private expressions of gratitude (for example, personally thanking them)
- providing development opportunities so volunteers stay motivated and feel like they are continually learning new things
- providing references for volunteers to recognise their experience in the organisation
- gaining feedback and input from volunteers using exit interviews or surveys, running focus groups, or drop-in sessions. It is also important to demonstrate that feedback is being acted on
- volunteers being involved in decision making through attendance at meetings, or providing other channels through which they can provide input (NHS England, 2017).



## 2. Structural and organisational elements of effective volunteer governance (continued)

Taken together, the generic approaches outlined in this section share many similar themes, but vary in the degree of detail that they contain. Common to the majority of these approaches is *planning and a commitment to volunteering prior to recruitment*. This may be achieved by conducting a needs assessment to identify gaps that volunteers could fill, development of a mission statement or vision for the volunteer program and clarity around how volunteer roles fit in with the goals of the organisation more broadly, having a budget, policies and procedures for volunteers, designing roles that represent a meaningful contribution and job descriptions that are sufficiently detailed.

Also common to the approaches reviewed are policies and procedures relating to *recruitment*. Effective recruitment may involve targeting specific types of people and aligning recruitment efforts with the marketing strategy of the organisation, encouraging diversity by providing volunteering information in a variety of different formats and languages, having a range of flexible roles to suit individual needs and ensuring a swift response to people expressing an interest in volunteering.

In terms of *interview, screening and selection* processes, the importance of ensuring fairness and carving roles to meet the needs of willing volunteers is emphasised in the literature. Providing creative alternatives for people who cannot be matched to a role is also recommended. All approaches emphasise the

importance of formal induction and orientation procedures, and most recommend that general induction is conducted first, followed by induction or training more specific to the role. Induction can be either one on one or in a group of multiple volunteers. Induction and training for staff working with volunteers is also recommended. *Support and supervision* while the role is being undertaken are highlighted as important facets of best practice. The provision of a key contact person and communication of clear lines of reporting for volunteers is emphasised. This is thought to minimise the chances of conflicts with paid staff, as responsibilities, boundaries and accountabilities are clearly defined. *Risk management* (for example, risk assessment, work health and safety guidelines, insurance) is also a common factor emerging from the literature, as is the value of providing *ongoing training and development* for volunteers, so they feel like they are continually building their skills base and don't become bored. Finally, formal and informal *recognition* of volunteer contributions and achievements, allowing volunteers to have *input into decisions*, and *evaluating both volunteer performance and the program* itself (for example, using exit interviews) are common factors emphasised by the majority of volunteering governance frameworks.

## 2. Structural and organisational elements of effective volunteer governance (continued)

### 2.2 – Context-specific approaches

While there may be value in providing a set of general statements regarding volunteers, a nuanced approach may more appropriately account for differences in organisational size, paid staff members, and type of service being provided by the organisation and its volunteers. In their review of the literature, Brudney and Meijs (2014) label these more flexible, tailored approaches ‘context-specific approaches’ and discuss them according to whether they are volunteer-focused or organisation focused.

#### 2.2.1 – Volunteer-focused approaches

Volunteer-focused approaches may be further classified as service delivery, support role, co-worker role or member/activist models (Rochester, 2007). A *service delivery* model denotes a clear and hierarchical relationship between volunteers and paid staff in an organisation. Volunteers are recruited for specific roles and paid staff to supervise them. In this sense, the model functions in a similar fashion to a workplace, and volunteers are considered unpaid staff (Brudney & Meijs, 2014). Alternatively, a *support role* model involves volunteers being allowed more collaborative input with the organisation’s paid staff. In this case, volunteers assist and support the staff in various roles (for example, as aides) and there is often greater flexibility in volunteer roles and the amount of supervision and autonomy they are given. However, the paid staff roles are clearly distinguished from the volunteer roles. In contrast, the distinction between volunteers and paid staff is less prominent in the *co-worker model*. In this scenario, decision making is collaborative and volunteers and staff perform similar roles (for

example, religious groups, political groups). Non-hierarchical teams work collaboratively to assist in management of volunteers, and a nurturing/enabling leadership style is common (Brudney & Meijs, 2014; Rochester, 2007). *Member/activist* models elaborate this notion further, with all organisational members acting as volunteers with the aim of achieving an agreed-upon and mutually understood goal. Examples of this type of governance structure are neighbourhood associations and cooperatives, where volunteers operate under a peer-management style of governance (Rochester, 2007).

Meijs and Hoogstad (2001) propose a dimensional model, with organisational goal on one axis (from campaigning/advocacy through to service delivery), and the relationship between paid staff and volunteers the other axis (ranging from volunteer-run to volunteer-assisted organisations). The authors suggest that volunteer governance models can be tailored according to these two factors. For example, organisations that are involved in service delivery and are also volunteer supported (that is, volunteers support existing paid staff in a hierarchical relationship) are said to require a ‘program management’ approach to governance (Meijs & Hoogstad, 2001). This means that volunteers are recruited to perform pre-assigned tasks. Alternatively, volunteer organisations that are involved in campaigning/advocacy and are run solely by volunteers would suit a ‘membership’ management style governance structure, which involves a volunteer manager working collaboratively with a group of other volunteers and the group agreeing on and developing tasks together.

## 2. Structural and organisational elements of effective volunteer governance (continued)

Rehnborg et al. (2009) developed an alternative two-dimensional model. One dimension considers the time involved in volunteering, from short-term/episodic to long-term/ongoing. The other dimension considers the nature of the volunteers' connection with the organisation, from *affiliation focused* (that is, the volunteer wants to be part of a particular mission or has a pre-existing relationship with the cause) or *skills focused* (the volunteer wants to gain skills or share their own skills through volunteering). From these two dimensions four different types of volunteers emerge: short-term generalist, short-term specialist, long-term generalist and long-term specialist. Rehnborg et al. (2009) posit that governance strategies should be matched according to the types of volunteers engaged with the organisation:

1. **Short-term generalist:** affiliation-focused, short-term/episodic volunteers (for example, volunteers for park clean-up events or charity sporting events). This requires management to have strong planning / project management skills, knowledge about and passion for the cause, diplomatic interactions with volunteers and be accessible to volunteers (that is, they have enough time to interact with volunteers). Other more practical governance recommendations include collecting volunteer contact information for follow-up and subsequent volunteering opportunities and budgets that allow for small tokens of recognition for volunteers (for example, refreshments).
2. **Short-term specialist:** skills-focused, short-term/episodic volunteers (for example, lawyers providing one-off pro bono legal advice, psychologists providing free counselling services after a disaster). Management should be skilled in recruiting, able to tell the story of the organisation and how this particular mission relates to or advances it, be capable of job-sculpting (modifying tasks and responsibilities to match the volunteer), flexible in how they perceive volunteer roles so that they can adapt to the needs of skilled volunteers and available to follow up or monitor volunteer progress. Other recommendations for management of short-term specialist volunteers include avoiding treating volunteers as subordinates, and instead viewing them as equals in their role; and sharing information so volunteers understand the organisation and can effectively prepare for the role.
3. **Long-term generalist:** affiliation-focused, long-term/ongoing volunteers (for example, youth mentors, volunteers at homeless shelters). These types of volunteers require managers to be aware of the long-term goals/directions of the organisation, to have strong interpersonal/organisational skills, the time to devote to volunteers, and preferably have experience leading people (staff or volunteers) in that specific organisation. This type of volunteering benefits from having comprehensive governance structures in place and staff with specific hours dedicated to managing volunteers. Also, budgetary considerations include regular rewards, recognition or reimbursement for these types of volunteers.

## 2. Structural and organisational elements of effective volunteer governance (continued)

4. **Long-term specialist:** skills-focused, long-term/ongoing volunteers (for example, volunteer firefighters, professionals offering ongoing services free of charge). These types of volunteers tend to require a more collaborative management approach and should be managed by someone with a role similar to theirs. They are likely to benefit from interaction with higher-level stakeholders (for example, board members, executive directors), and paid staff should be allocated time to learn from the skills these volunteers bring. In this sense, volunteers are treated more like experts, who are lending their knowledge and expertise to the organisation and from whom the organisation can learn (a reciprocal relationship). Efforts to keep these volunteers involved and informed are critical, as are provision of appropriate resources (for example, work stations, recognition, reimbursements).

Thus, the volunteer types elucidated by Rehnberg et al. (2009) provide guidance on appropriate volunteer governance structures and practices. Each type of volunteer role denotes a different relationship with other staff and stakeholders in the organisation. For example, long-term specialist roles are essentially more collaborative, and volunteers would be expected to be treated equal to paid staff in their respective fields; whereas short-term generalist roles involve more hierarchical relationships between volunteers and the various other roles in the organisation.

Other models of volunteer management (such as the 'natural resource' conceptualisation) also take a more flexible and holistic approach, and advocate for an expansion of the traditional 'workplace' conceptualisation of volunteering (Brudney & Meijs, 2009). This model seeks

sustainability and regenerative capacity of the volunteer workforce by focusing on volunteer needs, rather than organisational needs. For example, the skills and assets a volunteer has, the time they have available, and the reasons for their volunteering should be accommodated and used to create suitable volunteer roles for them. This stands in contrast to traditional models, where roles are defined prior to the volunteers' involvement. Instead, the natural resource model emphasises negotiation between the volunteer and the organisation to arrive at roles that are fulfilling and valuable to both parties (Brudney & Meijs, 2009).

In a similar vein, other studies have conceptualised volunteering as 'active citizenship' (Kenny et al., 2008). A qualitative investigation involving in-depth interviews with 15 councils investigated volunteer management in the context of local governments in Australia. Findings reveal a shift away from viewing volunteers as having to be 'managed', and toward viewing volunteers as being 'active citizens'. In this sense, volunteering was seen as a form of community participation, whereby community members (rather than experts) identify their own needs and work to change society accordingly. The specific mechanisms and conditions under which this model might work best are not articulated by the authors. However, they do theorise that viewing volunteering as active citizenship would reduce problems associated with an imbalance of power (that is, where volunteers are the givers and organisations are the beneficiaries). This approach is also considered to be more in line with a push

## 2. Structural and organisational elements of effective volunteer governance (continued)

to build active, sustainable communities, where community members are equal participants (Kenny et al., 2008). Again, this research advocates for a more volunteer-focused, flexible view of volunteer governance in place of a more traditional 'workplace' model.

### 2.2.2 - Organisation-focused approaches

Organisation-focused approaches emphasise the type of service being offered and the culture/mission of the organisation in determining which volunteer governance structure is the most appropriate. Macduff et al. (2009) provide an organisation-focused model of volunteer management, again organised according to a two-dimensional, four-category structure. One dimension relates to the extent to which the program/organisation is aimed at radical change (shifts in structures) versus regulation (preserving the status quo). The second relates to the extent to which the program/organisation operates in a flexible environment (a fluid, collaborative context) versus a stable environment (featuring systematic protocols for operation). These dimensions produce four types of volunteer programs:

1. **Traditional:** regulation/status quo, stable environment (for example, government agencies). The volunteer relationship with staff tends to be hierarchical, and managers in these types of organisations should utilise set standards and policies when managing volunteers.
2. **Social change:** radical change, stable environment (for example, activist groups). Managers need to possess strong leadership skills, be capable of effectively organising activists and be passionate advocates of social change themselves ('cause-oriented').
3. **Serendipitous:** regulation / status quo, flexible environment (for example, unstructured helping/volunteering, such as volunteers who present at an office with free time and ask if they can help). These types of volunteers are usually coordinated rather than managed in a formal sense, but managers should aim to collaborate with these volunteers and where possible allow them some input in decision making.
4. **Entrepreneurial:** radical change, flexible environment (for example, self-named leaders, people who have chosen themselves to solve some kind of social problem independent of an overseeing organisation). Because this type of volunteering involves people who are both the volunteer and the manager (and who view themselves as entrepreneurs rather than volunteers), governance strategies are irrelevant. This kind of volunteer may affiliate themselves with other programs (become 'joiners') if they are given the opportunity to make change and have autonomy to make decisions (Macduff et al., 2009).

While the specifics of which management styles/practices might work with which type of volunteer program are only vaguely described by Macduff et al. (2009), their model suggests that these factors should be taken into account when developing governance strategies for volunteers. It is likely that 'best practice' for each of these different programs will be widely varied.

A flexible model of volunteer governance is also proposed by Hager (2013), who argues that generic practices in volunteer administration were not appropriate for the current volunteer workforce, many of whom prefer less traditional,

## 2. Structural and organisational elements of effective volunteer governance (continued)

more short-term/episodic volunteering opportunities. A 'best practice' model was therefore considered to be counter-productive and offering limited value. Instead, Hagar proposes an 'emergent model' which takes into account the specific needs of the organisation/program and tailors governance systems accordingly. The use of 'emergent strategies' for effective volunteer management is seen as being akin to creative problem solving, with an emphasis on 'the creative application of ideas to new or complex problems' (Hager, 2013, p. 5). In essence, Hagar's model involves the organisation adapting and dealing with the management of volunteers in a creative and individualised way, rather than a prescriptive, standardised one. Two methods to enhance emergent approaches are discussed. The first, scenario planning, is a teamwork approach where managers and other staff are encouraged to envision a range of possibilities for the organisation/mission – no matter how unlikely they are – and imagine 'uncertain futures' (p. 6). These uncertain futures are then used to develop organisational strategies, allowing organisations to match their strategies to their own time, place, situation and organisational culture. The second, problem solving, involves an assessment of the needs of the organisation, and then applying creative approaches to meet these particular needs, which make sense in the context of that organisation. Although this framework for the development of volunteer management strategies is quite broad, it supports the notion that specific organisational characteristics need to be taken into account when developing optimal structures and strategies for effective management of volunteers.

In summary, a number of generic approaches to volunteer governance have been proposed, which provide broad recommendations that aim to maximise the success of volunteer programs. However, a consideration of both the type of volunteer (volunteer-focused models) and the type of organisation (organisation-focused models) is necessary to comprehensively adapt a governance model to a specific organisation and its unique goals. Thus, the information provided from the more prescriptive generic approaches should be used in a flexible manner, and informed by a consideration of the volunteer and the organisation that the governance model is intended for.



## 3. Relationships and communications with and between key stakeholders

The literature search produced some information relevant to effective governance of key organisational stakeholders; however, most of this research did not pertain directly to volunteers. Rather, it considered volunteers as just one of many stakeholder groups. Research on non-profit organisations which tend to utilise volunteers extensively may provide evidence transferrable to managing relationships in volunteer organisations. This section includes a summary of this research.

### 3.1 - Stakeholder theory

Wellens and Jegers (2014) used 'stakeholder theory' as a framework to conduct a literature review with the aim of identifying factors associated with effective governance of non-profit organisation stakeholders. Stakeholder theory posits that managers in organisations have a responsibility not just to the consumers of their services, but also to other stakeholders who are affected by the activities of the organisation (Freeman, 1984). Thus, effective management of the relationships between various stakeholders is predicted to produce a competitive advantage for that organisation. However, it is acknowledged that the needs and expectations of different stakeholder groups can vary significantly, and in some cases can even be conflicting (Wellens & Jegers, 2014). They note the dearth of available research on the relationships between stakeholders in non-profit organisations, in terms of their needs and objectives and also the governance structures which best meet these. They expanded their search to include more general organisational effects of stakeholder relationships, and synthesised the results of 110 (mostly US-based) studies. Results are presented from the perspectives of each stakeholder group.

In relation to volunteers, negative client contact experiences tend to reduce volunteers' commitment and motivation and, consistent with previously reported research, they tend to value training and support from managers and other paid staff in the organisation. Volunteers place a high value on social interactions with paid staff and other volunteers. Opportunities to provide input into the running of the organisation were highly valued and resulted in increased commitment. The review highlighted tensions between volunteers and paid staff resulting from staff feeling threatened by volunteers who could feasibly perform their role. A mismatch in perceptions of the role and identity of the non-profit organisation can also create tensions between volunteers and paid staff (Wellens & Jegers, 2014).

For paid staff, the review found employee motivation and commitment to the non-profit organisation to be associated with having a good fit between organisational policies and the individual's own needs and values, perceived meaningfulness of their work and the belief that they were making a difference in people's lives. Dissatisfaction and conflicts arise when employees feel left out of organisational changes, or when reasons for change were not well understood. Thus, empowering employees by allowing them input and listening to their views was recommended to reduce the risk of conflict, particularly when implementing changes in the organisation. In terms of relationships, these were especially important for employees, because satisfaction was significantly related to client contact and contact with other employees;

### 3. Relationships and communications with and between key stakeholders (continued)

however, relationships with volunteers were more tenuous. Stress and increased perceptions of workload were found to result from negative employee–volunteer relationships, and this lowered their commitment to the organisation. Thus, potentially volatile staff–volunteer relationships can have negative consequences for the organisation (Wellens & Jegers, 2014).

The review also considered the perspective of other key stakeholder groups, including clients (or beneficiaries of the organisation/program), government stakeholders, private donors and board members. Including clients in organisational governance was generally considered to impact positively on the organisation; however, a lack of research in this area means that the best way of facilitating this involvement is unclear. Good relationships and communication with government was also found to offer numerous potential benefits to the organisation, but in reality, engaging in ongoing communication with government resulted in less time available for the non-profit organisation to provide quality services to clients (Wellens & Jegers, 2014).

The review provides insights into the different stakeholder groups associated with non-profit organisations and outlines potential conflicts in communication and interests that might occur between them. However, Wellens and Jegers (2014) note that while much literature has described the nature of conflicts of communication, ‘best practice’ in terms of managing or preventing these issues has not been established, and neither have alternative governance models been tested against one another in this context.

Other research has sought to apply stakeholder theory to understand relationships between the organisation and stakeholders in non-profit organisations. Knox and Gruar (2007) argue that ‘relationship marketing’ (focused on the development and maintenance of strong relationships between the organisation and stakeholders) is more effective for non-profit organisations managing competing stakeholder groups than utilising a more traditional ‘transactional marketing’ framework (where tangible benefits are emphasised – typical of commercial organisations). They used a longitudinal case study in a large non-profit organisation in the United Kingdom (a medical research charity) to test a relationship management model which was sensitive to different stakeholders. A multi-methods design utilising questionnaires and interactive workshops with 14 managers resulted in the development of a systematic method to identify and prioritise different stakeholders according to their ‘saliency’ for the organisation (a concept originally formulated by Agle et al., 1999). According to this model, stakeholder saliency was conceptualised a function of three factors: the stakeholder’s *power* to influence the organisation; the *legitimacy* of their relationship with the organisation; and the urgency with which the stakeholder’s concerns, demands, or views require attention (Agle et al., 1999).

### 3. Relationships and communications with and between key stakeholders (continued)

Stakeholders are therefore considered more salient when they wield a large amount of power, their relationship with the organisation is well established, and their claims are urgent. It is thought that more salient stakeholder relationships should be given higher priority in the non-profit organisation. The Agle et al. model provides general guidelines for management of stakeholders with different levels of power, legitimacy and urgency. They identified three profiles of stakeholders: latent, expectant and definitive.

- *Latent stakeholders* are those that possess one of the three attributes: either power or legitimacy or urgency. It was found that managers' relationships and interactions with these types of stakeholder are minimised, because they tend to be less involved with the non-profit organisation. However, management should keep in mind their potential to gain a second attribute and thus exert more influence over the organisation.
- *Expectant* stakeholders are those with two attributes (for example, both legitimacy and urgency, but not power). Management concerns for these stakeholders varied according to the attributes displayed. Of particular concern were those with both power and urgency (labelled as 'dangerous' stakeholders). This group can be problematic, because they tend to be coercive and potentially destructive, and so efforts to contain or control their influence were recommended. Those with power and legitimacy ('dominant' stakeholders) are an important group for managers to attend to, because they tend to expect – and also receive – a lot of management attention.
- *Definitive* stakeholders are those with all three attributes. Because of this they tend to be highly salient and require the immediate attention of management. Thus, these stakeholders tend to be prioritised over others and hold the highest influence over the organisation (adapted from Agle et al., 1999).

These stakeholder profiles were validated in the case study conducted by Knox and Gruar (2007). *Grant recipients* were identified as the most influential stakeholder group, followed by *donors*, who provide funds to the organisation and are therefore a high priority. *Influencers* were the next most important group, because these people promote awareness of the charity and have much interaction with the general public. *Partner organisations*, the *expert audience* (in this case, the British Medical Association), and *volunteers* (for example, those who operate the charity shop) were next in terms of prioritised stakeholders. Finally, given the lowest priority were the *beneficiaries* – those the organisation was trying to help (although the organisation did note that they were attempting to accommodate the voice of the beneficiary more effectively across the organisation). Thus, the amount and nature of communication between stakeholders and the organisation tended to be determined by the perceived importance of the opinion of that stakeholder. Volunteers, in this case, were relatively low in priority compared to other stakeholders such as grant recipients. While it is difficult to make specific recommendations about governance for each of the different types of stakeholders from this largely conceptual research, the broad implication is that stakeholders with

### 3. Relationships and communications with and between key stakeholders (continued)

power, legitimacy and urgency should be managed more intensively than latent stakeholders and be given immediate attention, because they have the potential to benefit the organisation to the greatest extent. However, this research is limited, due to its case study methodology, and so does not allow for comparisons between different management models (across different organisations).

#### 3.2 - Creation of positive stakeholder relationships

While a comparison of different governance methods is not available, Balsler and McClusky (2005) conducted qualitative research with executive directors of non-profit organisations to examine expectations of different stakeholder groups, and management of stakeholder relationships. Semi-structured interviews were conducted with executive directors of seven non-profit organisations providing human and social services in the United States. Independent expert raters then evaluated the effectiveness of each organisation in terms of its global organisational management and effectiveness in dealing with different stakeholder groups. Based on this assessment, two of the seven organisations were considered to be 'highly effective' and were used as best practice exemplars in the study, and one non-profit organisation with the lowest rating was used as a comparison.

Results reveal that organisations tended to be perceived as more effective when they utilised consistent and well-articulated rationale and values to deal with the various stakeholders. This would be expected to reduce some of the problems identified by Wellens and Jegers (2014); for example, stakeholders holding conflicting views regarding the organisation's mission and values. By referring to the mission/core values in all communications with all stakeholder groups, ambiguity is reduced. Thus, consistent adherence to a mission/core value statement and cultivating positive stakeholder relationships were seen to go hand in hand. Furthermore, cultivating strong relationships between stakeholders enables problems to be identified and addressed at an early stage. These factors were seen as integral to the success of non-profit organisations (Balsler & McClusky, 2005). However, this study included only a small sample of non-profit executives being interviewed at length, and data comparing different approaches to stakeholder management were not available. Nevertheless, the findings provide useful insights into how relationships between stakeholders may be effectively managed.

### 3. Relationships and communications with and between key stakeholders (continued)

#### 3.3 - Relationship between volunteers and the organisation

Bortree and Waters (2008) examined the perceived quality of the relationship (or partnership) between volunteers and the non-profit organisations they volunteer for using intercept surveys at volunteering fairs in the United States. Data from 144 volunteers indicate that they viewed their relationship with the non-profit organisation generally positively, with non-profit organisations from the health care sector being significantly more trusted, admired and garnering more commitment than other types of organisations (for example, religion, education, human services). There was an association between the type of organisation and volunteers' perceptions of their relationships with it. The level of involvement volunteers had with the organisation also predicted the strength of the relationship. However, the strongest predictor of perceived relationship quality was admiration – specifically, the respect the volunteer has for the non-profit organisation *and* the respect they gain in return. This finding reinforces the importance of the two-way relationship between what the volunteer gives to the organisation and what the organisation gives them in return.

Taken together, evidence suggests that stakeholder theory may be applied to provide better understanding of the relationship between volunteers and the organisation, as well as volunteers and other key stakeholders such as paid staff. Cultivating strong, positive relationships between stakeholder groups, and ensuring a consistent understanding of the organisations philosophy, mission and objectives appears to be key to managing relationships among various stakeholders.

## 4. Perceived roles and contributions of volunteers and paid staff

The role of volunteers in an organisation can vary greatly depending on task, experience and the type of organisation. However, some overarching principles for defining and communicating volunteer roles have been elucidated by Volunteering Australia (2015). These standards require that volunteers be engaged in roles that meaningfully contribute to the aims of the organisation. The fundamental principles behind effectively developing, documenting and communicating roles include that:

- Roles are designed to contribute to the organisation's aims, goals and mission. Evidence of this could include providing descriptions of each role that highlights how it contributes to the overall aims of the organisation.
- Roles are developed so they are relevant and appropriate for the community/service user that is targeted by the organisation. Evidence of this may include offering volunteer roles that attract people with a diverse range of experiences and attributes, and using innovative ways of involving volunteers (for example, flexible time commitments to account for volunteer availability).
- Roles are defined and properly documented, and this is communicated clearly with volunteers and others working with them. Evidence of this may come from ensuring the relationship between paid staff and volunteers is clearly defined, and sufficiently detailed written descriptions of roles (for example, including tasks, responsibilities, accountabilities, performance standards).
- Roles are reviewed regularly, using input from both volunteers and paid staff. Evidence of this may include the contributions of stakeholders at all levels (for example, management, paid staff, governance staff, volunteers) to the evaluation and review of volunteer roles (adapted from Volunteering Australia, 2015).

While these standards are generally useful to guide volunteer management in an organisation, a more detailed look at roles, responsibilities and expectations of volunteers, and how these compare with expectations of paid staff and other stakeholders, may provide deeper insights regarding how to best manage and retain volunteers. The relationship between volunteers and the organisation may be strained when expectations and perceived responsibilities on either side are unfulfilled (Netting et al., 2005). The following section examines the notion of 'psychological contracts' in the volunteering literature, to identify how this may inform effective governance of volunteers.

### 4.1 - The psychological contract

Netting et al. (2004) provide a review of conceptual literature examining the dynamics of paid staff and volunteer relationships, particularly as they are applied to social work administration. The notion of 'psychological contracts' is highlighted as a core factor impacting these relationships and perceptions of roles in them. A psychological contract in reference to volunteering is a set of assumptions or beliefs that a volunteer has about the service they are expected to provide, or the role they are expected to perform, and the obligation the other party (in most cases



#### 4. Perceived roles and contributions of volunteers and paid staff (continued)

the non-profit organisation) has toward them in return. In this sense, psychological contracts denote a reciprocal relationship based largely on *trust* between the volunteer and the organisation, and the *expectations* the volunteer has about the benefits or rewards they receive as a result of their involvement (Netting et al., 2005). However, due to the individualistic nature of the psychological contract, it varies from role to role, between organisations, and also according to personal motivations and the circumstances of the volunteer. Thus, perceived violations of this contract and the consequences of such violations can also vary significantly between individual volunteers (Netting et al., 2004). Furthermore, psychological contracts are intricately linked to the organisation's expectations regarding the volunteer's role (Netting et al., 2005). These complexities highlight the importance of understanding how volunteers view their roles, relative to staff, in order to provide recommendations for reducing conflict relating to violations of this contract.

Research from the perspective of psychological contracts indicates that both the relational dimension (social/emotional factors such as trust, loyalty, sense of community) and the value-based dimension (motivated by an affinity for the cause or mission of the organisation) are particularly relevant to the retention of volunteers, and may also be sources of conflict between individuals (Stirling et al., 2011; Vantilborgh et al., 2012). For example, in their Australian study, Stirling et al. (2011) tested the applicability of the concept of a psychological contract to the relationship between volunteer recruitment and retention and management practices. The study utilised a mixed-methods approach, with

surveys (n = 152 volunteer organisations) and semi-structured interviews (n = 67 volunteers or volunteer coordinators) to ascertain which management practices resulted in the highest retention of volunteers. Management strategies aimed at fulfilling relational expectations for volunteers (for example, recognising volunteers, publishing newsletters specifically for them) were found to significantly (positively) predict volunteer retention, suggesting that relational experiences are an important part of the psychological contract for volunteers. Conversely, management practices that emphasised the transactional dimension (for example, monetary exchanges) of the psychological contract were negatively related to volunteer recruitment and retention. In these cases, practices such as formal record keeping and not paying volunteers' out-of-pocket expenses tended to be seen as violating expectations, and hence the psychological contract between volunteer and organisation had been broken. This suggests that, generally speaking, volunteers are more motivated to continue in their roles when there are social/emotional rewards, and also emphasises the damage that can be caused when expectations of these rewards are not met.

Vantilborg et al. (2012) sought to extend the idea of psychological contracts in volunteering beyond a simple examination of relational versus transactional dimensions, by testing the viability of a third 'value-based' dimension. The value-based dimension refers to the perceived obligation of the organisation to maintain commitment to their cause or mission, particularly when this cause is highly valued by the volunteer. This notion therefore incorporates the volunteer's ideas

#### 4. Perceived roles and contributions of volunteers and paid staff (continued)

about what the organisation is trying to achieve and whether it is being fulfilled in a way that is consistent with the organisation's ideology. Vantilborgh et al. (2012) conducted in-depth interviews with volunteers from two non-profit organisations in Belgium (n = 25), and used the critical incidents technique to uncover situations where the psychological contract was considered to have been either breached or fulfilled by the organisation. Results support previous research which reveal stronger emphasis on the relational aspect of the psychological contract than on the transactional. Yet results also reveal that the value-based dimension of the contract was an important factor in the fulfilment or breach of contracts in the volunteering context.

Examples of value-based obligations of non-profit organisations include:

- ensuring all staff, board members, managers and volunteers are similarly aligned to the cause or mission of the organisation
- allowing volunteers to perform tasks that contribute to the cause, rather than tasks which add little to the cause (for example, administrative tasks)
- cultivating enthusiasm among volunteers and others for the mission

Volunteers saw their role in this contract as:

- acting as an advocate for the cause
- taking initiative in the non-profit organisation towards achievement of the mission
- contributing to the achievement of goals

The research of Vantilborgh et al. is qualitative in nature, and could be subject to the personal bias of the volunteers (it uses retrospective accounts of critical incidents). However, an examination of psychological contract theory is helpful in understanding how volunteers see their role (obligation) in the organisation, and what might constitute a violation by the organisation of their psychological contract.

An Australian study by Taylor, Darcy, Hoyer and Cuskelly (2006) also highlights the differences in motivations between managers and volunteers and the relevance this has to psychological contract theory. Focus groups were conducted with 98 community sports club administrators, to explore their expectations of volunteers and their organisations volunteer management practices. The qualitative data was compared to data from 48 volunteers in an attempt to identify any potential divergences in expectations between the two groups. Again, results from volunteers demonstrate the importance of performing work that they considered 'rewarding' and a focus on the social aspects of the work (for example, the social environment and networking opportunities). Additionally, volunteers valued working in environments that account for their time availability. Conversely, expectations of administrators centred on volunteers adhering to professional, legal and regulatory standards (for example, adherence to occupational health and safety guidelines, professionalism in their dealings). Thus, administrators tended to emphasise the transactional nature of the contract to a greater extent than did volunteers; whereas volunteers were again found to be more focused on relational aspects (Taylor et al., 2006).

## 4. Perceived roles and contributions of volunteers and paid staff (continued)

Taken together, research suggests relational and value-based dimensions are particularly important to volunteers in non-profit organisations, so care should be taken to avoid violating perceived obligations with respect to social/emotional relationships and organisational mission. In terms of governance/management of volunteers, conflicts are likely to be minimised when volunteers' relational expectations are fulfilled by the organisation (Taylor et al., 2006). Thus, governance models that focus on embedding the volunteer in the social environment and making them feel like a valued part of the organisation (for example, social gatherings, recognition in newsletters and networking) may not only reduce conflict between volunteers and staff, but may also result in greater retention of volunteers more generally.

### 4.2 - Relationships between volunteers and paid staff

Research conducted in the United States by Rogelberg et al. (2010) specifically examined volunteering from the perspective of paid staff. Employees working alongside volunteers (n = 270, animal care sector) completed online and paper questionnaires about their experience with and attitudes toward volunteers, workload and work stress, management practices at their organisation, commitment to the organisation, job satisfaction and intention to quit. Employee experiences with volunteers were generally positive, but there was a high degree of variability. More negative experiences with volunteers were associated with work stress and workload, suggesting that a lack of time/resources and greater job demands produce more negative

attitudes of staff toward volunteers. In addition, volunteer resource management practices significantly predicted ratings of volunteers. Specifically, the following management practices positively influenced paid staff perceptions of volunteers:

- mandatory and structured training for volunteers
- system for performance evaluation of volunteers
- formal policies for handling problems with volunteers and conflicts
- screening and recruitment systems for volunteers
- social occasions to encourage volunteer staff interpersonal interactions.

The results from Rogelberg et al. also highlight the impact volunteers can have on paid staff, with lower quality experiences with volunteers predicting intention to quit, and positive experiences predicting organisational commitment. Results suggest that organisational management practices with respect to volunteers play an important role in determining acceptance of volunteers by paid staff, and overall satisfaction of paid staff. Findings also reinforce the importance of formalised recruitment, training, evaluation and conflict resolution policies for volunteers, and the positive impact of developing social bonds between paid staff and volunteers.

Evidence suggests that paid staff and volunteers tend to have different motivations for their work in an organisation. These differences in motivations may help to explain conflictual staff–volunteer relationships, as differences in motivation may translate to conflicting ideas about roles, rewards and goals. As part of their conceptual review,

#### 4. Perceived roles and contributions of volunteers and paid staff (continued)

Netting et al. (2004) cite literature (for example, Pearce, 1983) indicating that volunteers were more likely than paid staff in the same setting to report being motivated by psychological rewards such as social interaction and service to others, and that they showed more organisational loyalty (were less likely to leave) and were more satisfied overall. This finding was supported by numerous studies of different organisation types; however, the age of this research makes its relevance to today's volunteer workforce unclear.

More recent studies have tried to replicate this finding (for example, Liao-Troth, 2001, n = 108) and suggest that the motivations and attitudes of volunteers and paid staff may actually be more similar than previously thought. In this structured (medical) setting, the highly trained volunteers were essentially treated as employees and did not differ in attitudes, psychological beliefs or commitment to the organisation. These conflicting results may indicate that where volunteers have similar skills and roles to paid staff and are therefore treated similarly to staff, their motivations are also similar. However, when roles are less structured and are more distinct from the paid staff roles, role perceptions and the rewards received by performing them may also differ.

Other research reviewed by Netting et al. (2004) identifies particular factors that (positively) influence volunteer satisfaction, including perceived organisational support (being given educational/emotional resources to fulfil their role); perceived empowerment (freedom to define aspects of their role); participation efficacy (the belief that the work being done is of benefit); and social group integration (relationships between the

volunteer and other staff) (Galindo-Kuhn & Guzley, 2002, n = 327 volunteers from an international non-profit organisation). Netting et al. (2004) also emphasise the need for paid staff to support volunteers, and note that without such support volunteers are more likely to feel neglected. Taken together, their review reveals a perception that paid staff would be resistant to volunteers; however, this was not strongly supported by the empirical evidence.

Boezeman and Ellemers (2009) report results from the Netherlands examining staff versus volunteer attitudes and motivations, by comparing types of needs expressed by each. Needs were classified as either relatedness needs (need to develop and maintain relationships), competence needs (need to meet standards of performance), autonomy needs (need to have choice/control). They compared 105 paid workers with a matched sample of volunteers. Results reveal that while paid staff were primarily motivated by autonomy needs, relatedness needs were the strongest predictor of satisfaction among volunteers (Boezeman & Ellemers, 2009). In other words, volunteers tended to be motivated to a greater extent by the potential to form and maintain relationships than paid staff. The notion that relatedness is a particularly important goal for volunteers highlights the importance of interpersonal relationships, and provides further impetus to develop ways of minimising conflict between volunteers and other stakeholders.

An Australian report based on a national survey of volunteers (Volunteering Australia, 2006) provides additional recommendations regarding management of relationships between volunteers and paid staff. An online questionnaire

## 4. Perceived roles and contributions of volunteers and paid staff (continued)w

was completed by 373 volunteers and 341 Australian volunteer organisations, with 90 per cent of organisations reporting that managing relationships between paid staff and volunteers was important to them. It was found that confusion, ambiguity or conflict between roles of volunteers versus paid staff was relatively common (reported by 28% of volunteers). Volunteers who had experienced this type of confusion or conflict reported the cause of such conflict as being:

- lack of recognition of skills of the volunteer and a perception that these skills were not valued as highly as those of paid staff
- role confusion or a lack of distinction between roles, resulting in paid staff and volunteers performing similar functions
- feelings of resentment by volunteers toward paid staff, particularly a resentment of being managed by them
- paid staff feeling threatened by skills or roles of experienced volunteers.

Organisational perspectives on the cause of tensions between paid staff and volunteers reveal similar themes, including:

- a power imbalance or power struggle between paid staff and volunteers (presumably where staff are thought to have more power)
- a lack of certainty about whether volunteers or paid staff should be the ones to undertake particular tasks and roles
- difficulties associated with openly addressing any issues that arise.

Understanding of the causes of conflict between volunteers and paid staff is critical in implementing governance structures that help prevent it from

occurring. Findings from large-scale surveys such as those reported by Volunteering Australia (2006) provide valuable insights from the perspectives of Australian volunteers and volunteering organisations, and can be used to inform the development of effective strategies for Australian volunteer governance.

### 4.3 - Minimising and resolving conflict

Interpersonal conflict in volunteer roles has been the subject of Australian research that identifies particular types of bullying argued to be somewhat unique in the volunteer sector (Paull & Omari, 2015). Results from an online qualitative study of 136 volunteers and volunteer managers found that one-third of respondents reported having been bullied while in their volunteer role. In particular, there was evidence of ‘upward bullying’, whereby volunteer managers are bullied by a volunteer or a group of volunteers. In this scenario, the voluntary nature of the perpetrator’s role meant that victims (managers) often felt powerless to act. Examples of upward bullying included volunteers refusing to follow set guidelines or making demands of managers that could not be fulfilled (for example, firing other volunteers that the perpetrator didn’t like). Further, recency of volunteering was often a source of conflict; for example, new volunteers being bullied by other longer-serving volunteers (horizontal bullying) and bullying of new paid staff/managers by volunteers. There was also some evidence of downward bullying; for example, volunteers being pressured by managers to sign codes of conduct that were not appropriate for their role. Paull and Omari (2015) argue that conflict was usually the result of issues relating to power/status, inappropriate behaviour, miscommunication or a lack of communication and poor interpersonal skills.

#### 4. Perceived roles and contributions of volunteers and paid staff (continued)

Other Australian research supports these findings. A study conducted by the Volunteer Rights and Advocacy Working Group (2013, cited in Paull & Omari, 2015) examined 113 complaints submitted by volunteers and that had been investigated. Results reveal that one-third of the complaints alleged bullying in the organisation, with other complaints relating to perceptions of being excluded and clashes between personalities (either with other volunteers or paid staff). Taken together, these studies highlight the complex nature of the relationship between volunteers, volunteer managers and paid staff. Evidence suggests that the power dynamic does not necessarily always work in favour of managers or paid staff, but that volunteers can at times exploit their power too and engage in upward bullying. This should be considered when developing processes for dispute resolution.

Garner and Garner (2011) provide evidence of the links between retention of volunteers, social connections with other members of the organisation and feeling empowered to express ideas; that is, feeling they have a 'voice'. They based their investigation around the notion of 'exit-voice-loyalty', which they hypothesised would predict volunteers' decision to leave, stay or act on a dissatisfying experience in the organisation. Specifically, they believed that the decision to leave the organisation in response to dissatisfaction (rather than voicing concerns and attempting to resolve the situation) related to level of loyalty: greater loyalty to the organisation resulted in greater likelihood of the volunteer voicing their opinion rather than exiting. However, another scenario was noted: 'neglect', which refers to instances where the

volunteer continues in their role but significantly reduces their effort. Through an online survey of 383 volunteers at non-profit organisations in the United States, Garner and Garner examined the links between psychological factors (for example, satisfaction and motivation) and decisions to exit rather than voice concerns in response to dissatisfaction/conflict. Results show that satisfaction with support from the non-profit organisation in response to conflict predicted retention (rather than exit). Results also reveal that, even when satisfied with organisational support, volunteers did engage in 'neglect' (for example, through arriving late, ignoring duties) in response to conflict, even if they did not exit the organisation. Integration into the social spheres of the organisation (for example, through networking events, staff meetings) was a significant predictor of retention following conflict – again showing the importance of developing fulfilling staff–volunteer relationships for volunteers in the organisation.

Use of considerate voice to raise concerns (for example, suggesting solutions to staff or managers) rather than aggressive voice (for example, making the problem sound larger or more serious than it actually is) in response to conflict was also predictive of retention. Encouraging volunteers to raise concerns or address conflicts using considerate voice, and ensuring they feel supported and able to give their feedback, is likely to increase retention when conflicts arise.



#### 4. Perceived roles and contributions of volunteers and paid staff (continued)

Rehnborg et al. (2009) suggest that effective management of the relationship between paid staff and volunteers can be enhanced by engaging paid staff at the very beginning of the volunteer planning process. Additional recommendations include:

- forming a committee of paid staff/stakeholders to provide input into the volunteering initiative, and listening to and addressing any concern that arise
  - ‘personalising’ the volunteering experiences of paid staff by encouraging them to think about times they had volunteered and services they performed so that they are encouraged to regard the volunteer workforce positively
  - orienting staff to the volunteering process so expectations are clear, and recognising staff who are supportive of volunteers
  - ensuring staff know what the capacities of the volunteer workforce are – what they can/can’t do, who they are and how much they can dedicate.
- recruitment strategies that match roles to the skills and needs of the volunteers
  - having an orientation procedure for volunteers
  - involving staff in the development of volunteer roles and placements
  - where staff are supervising volunteers, providing training on how to do so effectively
  - implementing formal policies outlining satisfactory and unsatisfactory conduct for all parties
  - implementing dispute resolution procedures, should tensions/conflict arise
  - clearly defining procedures for volunteers to voice concerns and/or ideas.

These recommendations aim to reduce role confusion and motivate staff to support volunteers in the organisation, despite any concerns about the availability of resources such as time and existing workloads.

An Australian manual for management of volunteers in health care settings (Commonwealth of Australia and Volunteering Australia, 2003) outlines the similarities and differences between paid staff and volunteers, and acknowledges the tension that can exist between these roles. Recommendations for minimising conflict include a focus on relationship building and effective integration of volunteers into the organisation. Effective integration is enhanced by:

The manual also suggests reasons that tensions and conflict between paid staff and volunteers may arise (Commonwealth of Australia and Volunteering Australia, 2003). These include: volunteers being seen as a threat to paid positions; lines of responsibility being blurred or not defined at all; and paid staff not accepting of the role of the volunteer, or have no input into the program. In terms of volunteer qualities, tensions may also arise if volunteers overstep their roles or resist the support and/or supervision from paid staff.

## 5. Discussion and recommendations

This rapid review provides insights into the types of governance structures and management practices that characterise high-performing volunteer programs, the nature of effective communications between key stakeholders of such programs and the differences in perceived roles and responsibilities of volunteers and paid staff. This section summarises and discusses the findings of this rapid review and evidence-based recommendations.

### 5.1 - Structural and organisational elements

Generally, there is a lack of scholarly research in the area of best practice in volunteer governance. However, the notion of best practice assumes that there is an optimal model of volunteer governance that will suit all organisations, and therefore does not account for the wide variation in the types of organisations, volunteering programs and roles available (Brudney & Meijs, 2014). Universal approaches to volunteer governance attempt to offer guidelines for best practice. However, because of their intended broad application, they tend to be vague, and offer generic guidelines, which often take the form of principles or general indicators. Common themes can be identified from the various guidelines and checklists currently available, including effective planning and documentation prior to the volunteering commencing, robust processes for recruiting and selecting appropriate people to fill volunteer roles, providing suitable induction and training for volunteers, ensuring volunteers have appropriate supervision and recognition for their efforts, effectively managing risk and ensuring programs are evaluated and reviewed (Ellis, 2010; Machin &

Paine, 2008; National Volunteer and Philanthropy Centre, 2012; UPS Foundation, 2002; Volunteering Queensland, 2017).

Alternatively, context-specific approaches to volunteer management take into consideration the wide variation between volunteer organisations; for example, in terms of their mission, the type of work performed, their size, structure and the number of paid staff members (Brudney & Meijs, 2014).

Context-specific approaches can be broadly classified according to whether they are volunteer focused or organisation focused. Various volunteer-focused approaches have been proposed, with the recommended governance structures being determined based on a range of factors, such as organisational goals and the relationship between volunteer and paid staff (Meijs & Hoogstad, 2001), the time involved in volunteering and the nature of the volunteers' connection with the organisation (Rehnberg et al., 2009). Other models of volunteer governance propose a more flexible approach and a shift away from the more traditional 'workplace' conceptualisation of volunteer management. The natural resource model is one such approach which seeks sustainability of the volunteer workforce by focusing on the needs of volunteers rather than the needs of the organisation (Brudney & Meijs, 2009). Other models view volunteers as 'active citizens' who use their own initiative to produce the changes they want, rather than as a resource that requires management (Kenny et al., 2008).

## 5. Discussion and recommendations (continued)

In contrast, organisation-focused approaches to volunteer governance focus on the mission of the organisation and the service being offered to determine appropriate governance structures. For example, Macduff et al. (2009) identify appropriate structures by classifying organisations based on the aims of the volunteer program and the nature of the environment in which the program is operating. Alternatively, Hagar proposes an ‘emergent model’ of volunteer governance which considers organisational needs, and tailors customised governance structures that account for these.

The identification of common themes across the various governance frameworks is helpful in providing guidance for volunteer program managers in terms of the different elements that should be included in a governance framework. However, in practice, the way in which these elements are applied to create a volunteer management framework needs to consider the particular context in which each individual volunteer program is operating, so that the framework is appropriate given the types of work being done, the types of people volunteering, other key stakeholders and so on. Two different governance frameworks might include all of the same key elements, but operate quite differently in terms of the level of complexity and bureaucracy involved, the way the volunteer program is structured and managed and the extent and scope of the different activities included (for example, recruitment). The same ‘generic’ elements might be applied, but consideration of the unique characteristics of a particular volunteer program – including those related to the volunteers and the

those associated with the organisation – results in a more unique ‘context-specific’ application of those elements in practice.

The development of comprehensive and detailed governance frameworks may be achievable for larger organisations that already have reasonably structured policies and processes in place for their other operations. However, smaller and community-based organisations that rely on volunteers for their survival may not be equipped to deal with added procedures and formalities. Barriers to the adoption of a formal governance framework could relate to: (1) not having enough human resources (either volunteers or paid staff) to develop and implement such structures; (2) not having individuals who have the skills to develop, document and implement formalised structures and processes (for example, people with the skills to write policies and position descriptions); and (3) not having the financial resources to support various aspects of such frameworks (for example, funding for recruitment campaigns, website development or volunteer rewards). This reinforces the need for governance frameworks to be customised so that they make efficient use of the resources available while optimising the achievements and outcomes of the volunteers and the program as a whole.

Assistance could be provided to volunteer managers by making resources readily available, such as appropriate information about developing governance frameworks being downloadable from a website, or by providing a hotline for volunteer managers to ask questions and obtain advice on their particular situation. Examples

## 5. Discussion and recommendations (continued)

from different types of volunteer organisations with different missions, of different sizes and with differing levels of resources, would help volunteer organisations visualise how they might translate the recommended components of a volunteer governance structure to suit their own unique circumstances.

### 5.2 - Relationships and communications with and between key stakeholders

Stakeholder theory is a useful lens through which to view the stakeholders in a volunteering context, because it requires managers to acknowledge the needs and expectations of all groups affected by their organisation or program. Key stakeholders in a volunteer organisation context may include volunteers, paid staff, clients or beneficiaries of the program, government authorities, donors and board members. Consistently reinforcing the mission and core values of an organisation contributes to the development of strong relationships between stakeholders, a factor found to be critical to the success of non-profit organisations (Balsler & McClusky, 2005). It also brings some degree of consensus and alignment of thinking to stakeholder groups which may otherwise come to the organisation with very different motivations and perspectives, and therefore reduce the potential for conflict and disagreement between the groups.

From the volunteers' perspective, having good relationships with managers, other paid staff and clients is important, and the opportunity to provide input into the running of the organisation is also highly valued. Tensions between volunteers and paid staff can arise if paid staff feel their roles

could potentially be performed by volunteers, or if there is a mismatch in perceptions of the role of the organisation (Wellens & Jegers, 2014). For paid staff, relationships with other staff and clients are especially important, and are related to job satisfaction. However, their relationships with volunteers are more tenuous, with negative staff-volunteer relationships associated with stress, perceptions of higher workloads, decreased commitment to the organisation and greater intention to quit (Rogelberg et al., 2010; Wellens & Jegers, 2014).

In terms of volunteers' relationship with the organisation itself, this is influenced by the mission of the organisation and the types of services it provides, volunteers feeling like they are valued and treated with respect and the level of involvement the volunteer has with the organisation. Developing strong affiliations between volunteers and the organisation is not only likely to increase volunteers' commitment and reduce the chances of them leaving, but it also means they are more likely to champion the cause of the organisation and speak positively to others about their experiences of volunteering. This has numerous positive flow-on effects, including acting as a volunteer recruitment mechanism by spreading positive word of mouth and strengthening the organisation's brand image by championing and actively promoting the organisation and its cause in a positive manner.

## 5. Discussion and recommendations (continued)

### 5.3 - Roles and contributions of volunteers and paid staff

In volunteering, a psychological contract refers to the beliefs and assumptions a volunteer has about the role they are expected to perform and the obligation the volunteering organisation has toward them in return (Netting et al., 2005). Due to the broad range of contexts in which volunteering can occur and the type of roles performed, the nature of the psychological contract can vary significantly for different individuals. Understanding how volunteers view their roles and the expectations they hold in terms of the reciprocal relationship with the organisation is important in being able to prevent and manage any perceived violations of this contract and minimise conflict. In the context of volunteering, psychological contracts have been shown to include three dimensions: relational, transactional and value based (Stirling et al., 2011; Vantilborgh et al., 2012). Overall, the available literature suggests that the relational and value-based dimensions of volunteers' psychological contract are particularly important, so managers should avoid violating perceived obligations with respect to social/emotional relationships and organisational mission.

Psychological contracts in volunteering also involve expectations in terms of the time people have to contribute to the role, and volunteers enjoy working in environments that account for and suit their time availability (Taylor et al., 2006). People are increasingly time poor (Australian Bureau of Statistics, 2015), and this has implications for what people decide to do with their limited time, including decisions about volunteering (Sundeen,

Raskoff & Garcia, 2007). Social commentators have also highlighted the fact that we (and in particular, younger generations) are increasingly less willing to commit to things, and like to keep our options open (for example, Mackay, 2007). For volunteering organisations, this suggests that volunteer programs would ideally offer different types of roles that vary in terms of the time they require of volunteers, and when and how often work is done (for example, from highly planned, regular jobs which are known well in advance, to more flexible work that is arranged at shorter notice and on a needs basis). Matching different volunteers with roles that suit their schedules is likely to result in increased satisfaction and retention of volunteers, and should also work to diversify the profile of volunteers associated with the organisation.

Organisational structures and practices can have a significant impact on the relationship between paid staff and volunteers. For example, management practices such as having formal structures for recruiting, training, monitoring and evaluating volunteers and formal procedures for resolving problems or conflicts have been found to significantly improve paid staff acceptance and perceptions of volunteers (Rogelberg et al., 2010). This suggests that consideration of paid staff and the management processes that support them to work with volunteers to maximum effectiveness is an important component of any volunteer governance framework. Some have sought to explain conflictual staff–volunteer relationships in terms of their differing motivations. Volunteers are more likely to be motivated by psychological rewards such as relationships and social interactions (Netting et al., 2004); whereas

## 5. Discussion and recommendations (continued)

paid staff are more likely to be motivated by other factors, such as having choice and control (Boezeman & Ellemers, 2009).

Evidence from Australian research suggests that bullying can occur in volunteering contexts, and may take the form of downward bullying (where managers bully volunteers) or even upward bullying (where the volunteers bully managers, either individually or as a group) (Paull & Omari, 2015). Effective management of the relationship between volunteers and paid staff can be achieved by involving paid staff from the very start of the volunteer initiative and encouraging paid staff to take the perspective of volunteers and reward them for supporting volunteers effectively (Rehnberg et al., 2009). Various strategies have been recommended to minimise conflict in volunteer organisations, including effectively integrating them into the organisation. It is recommended this be done, for example, by having orientation procedures for volunteers, implementing formal policies for acceptable conduct by all parties and including and having effective dispute resolution procedures (Commonwealth of Australia and Volunteering Australia, 2003).

Given the often different perspectives of volunteers and paid staff, it is important to consider this perspective when designing governance structures that aim to support all parties. For volunteers, this involves mechanisms that make them feel valued and listened to. They need to feel as though they have an affinity with the organisation's mission and are respected by the other stakeholders including paid staff. Paid staff typically experience different issues, such as feeling threatened by volunteers who might take their paid roles or feeling as though volunteers

are adding extra administrative and management tasks to an already full work schedule. Central to reducing conflict between the groups is developing an appreciation among all parties of both perspectives, and developing strong relationships, so that the different parties can focus more on their common goals (for example, the mission of the organisation and importance of the cause), rather than conflicting viewpoints.

### 5.4 - Recommendations

Based on the research and evaluations reviewed, evidence-based recommendations for volunteer governance structures include:

1. **Ensure the key aspects of effective volunteer governance are included in any volunteer management framework.** Based on the literature reviewed, these include:
  - a. **Planning:** define the philosophy, mission and objectives of the volunteer program and the organisation's commitment to it; identify opportunities for volunteer roles in the organisation and meaningful roles that are valued by volunteers; identify the resources required and budgeting; develop an implementation plan; write sufficiently detailed position descriptions for volunteer roles, including reporting lines and management structure; prepare all relevant documentation; communicate the volunteer plan to key stakeholders, including paid staff.



## 5. Discussion and recommendations (continued)

- b. **Recruitment and selection:** prepare recruitment strategies that align with organisational marketing strategies; make prompt responses to individuals expressing interest in volunteer roles; have processes that are fair, equitable and inclusive; conduct interviews to assess the individual's match with the organisation and suitability for the roles available; provide flexibility in tailoring roles to match volunteer skills and needs and creating alternatives for people who cannot be matched to available roles; ensure information about volunteering opportunities is suitably presented and accessible for diverse range of people.
  - c. **Induction and training:** provide an initial induction, as well as any training the volunteer needs specific to performing the role; offer ongoing training of volunteers to ensure skills are up to date and volunteers are continually learning and don't become bored; provide training as required for any other organisation staff and stakeholders involved with the volunteer program.
  - d. **Supervision and support:** provide appropriate supervision and support according to individual needs and roles; ensure volunteers have the resources they need to perform their roles; give feedback to volunteers on performance; allow volunteers to provide input and feedback so they feel valued and involved with the organisation; regularly monitor volunteer satisfaction and any changes in their motivations for involvement or needs; encourage the development of relationships in the organisation.
  - e. **Recognition and rewards:** personally and publicly recognise volunteer contributions; communicate volunteer achievements to key stakeholder groups; provide rewards or other actions that are meaningful for that particular person.
  - f. **Risk management:** identify and document any risks to volunteers, paid staff and the organisation; have strategies and procedures in place to minimise and manage them.
  - g. **Program evaluation and review:** review achievements, challenges and the extent to which the program is working efficiently and effectively; review the program as appropriate to ensure processes and policies are up to date and working optimally; keep appropriate records and report outcomes to key stakeholders. Volunteers should be involved in this process (for example, through exit interviews) so that all relevant perspectives are considered in the review.
2. **Customise the features of the governance framework to be appropriate for individual volunteer programs:** while ensuring the above features are present in any volunteer governance framework, individual volunteering organisations should customise each element, so that the volunteer management structures are appropriate, given the context in which the organisation operates, the mission and culture of the organisation, the structure and leadership style of the organisation, the resources available, the types of work being performed by volunteers, the types of people being targeted and actually performing the volunteer roles.

## 5. Discussion and recommendations (continued)

3. **Communicate clearly and consistently with key stakeholders:** ensure that consistent and well-articulated communication of the organisations rationale and values with key stakeholder groups works to develop positive relationships between them; avoid ambiguity or the development of conflicting views on the organisation's mission and values.
4. **Develop strong affiliations between volunteers and the organisation:** emphasise the importance of the mission, goals and values of the organisation; treat volunteers with respect and make them feel valued; offer opportunities for volunteers to become more involved with the organisation.
5. **Implement management practices that emphasise and prioritise the relational and value-based dimensions of volunteers' psychological contract:** encourage volunteers to build social relationships with one another and with other stakeholders (for example, paid staff). This contributes to building trust, loyalty and a sense of belonging. In terms of value-based dimensions, the importance of the cause should be emphasised in order to strengthen volunteers' affiliation with the organisation mission. Give volunteers meaningful roles that contribute to this mission; ensure that the organisation's actions are clearly aligned with this at all times.
6. **Volunteer opportunities should take account of individuals' time availability:** offer different types of volunteer roles which vary in terms of the time required and when and how often time is required of the volunteer. Ideally, this would range from highly structured jobs that require regular donations of time to flexible jobs that require ad hoc time commitments that could be accepted or rejected according to the other commitments individuals have at that time.
7. **Give important consideration to the role and perspective of paid staff in the volunteer program governance framework:** effective management practices that positively influence paid staff perceptions of volunteers and decrease stress and intention to quit include formalised structures for recruiting, training and evaluating volunteers; policies for managing problems and conflicts with volunteers; and providing opportunities for staff and volunteers to interact on a social level to build and strengthen relationships.
8. **Ensure volunteers feel empowered to express their opinion and feel like their voice is being heard:** provide various opportunities for volunteers to provide feedback and input into decision making; actively solicit volunteers' opinions and ensure this input is taken seriously and acted upon. This is likely to increase the chances that volunteers will raise concerns in a considerate manner and through appropriate channels when they feel dissatisfied with some aspect of their volunteer experience, rather than take a less desirable option such as continuing in their role, but with considerably less effort or leaving the organisation all together.

## 5. Discussion and recommendations (continued)

### 9. **Implement mechanisms that build positive relationships and minimise conflict between volunteers and paid staff:**

ensure paid staff are involved from the very start of the volunteer planning process; that they provide ongoing input into the volunteering initiative; and are rewarded for supporting volunteers. This should help paid staff develop a positive attitude towards volunteers, and that any resistance from paid staff to the volunteer program is minimised or eliminated. Other mechanisms include: provide training for paid staff on how to supervise volunteers effectively; match roles to the skills and needs of volunteers; document what is considered appropriate conduct for all parties; have clearly defined procedures for volunteers to voice concerns; and implement dispute resolution procedures should conflicts arise.

### 10. **Give priority and attention to stakeholders in terms of their relative importance and ability to benefit the organisation:**

identify who the stakeholders are and their relative importance; set up governance structures and allocating resources so that the organisation can respond effectively to salient stakeholders when necessary. It is important to make sure less salient stakeholders are not neglected in this process, but rather that the organisation consciously determines the most effective allocation of resources to minimise risk and achieve optimal outcomes.

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