



Creating a Healthy Organizational Culture to Attract and Retain ESC Volunteers

February 2, 2:30 Eastern time

Presenters:

Paul Moore
Vicky Foxworth

Listeners:

Darlyne Koretos, Cincinnati
David Factor, LA
Burt Hering, Houston
Jan Burrell, Washington
Julie Crockford, Boston
Kathy M. Leone, FL (Impact Broward)
Michael Towers, New York
Scott Hayman, Washington
Trudy Smith, North Carolina
Yvonne Van Haitsma, Pittsburgh

Paul Moore, President/Executive Director, Executive Service Corps of Central OK

While our topic is about retaining volunteers, to get there we must first talk about organizational culture and reach a common understanding of it. For most of this, I consider staff and volunteers as interchangeable. In a 40 year career with the Boy Scouts of America, I was always outnumbered! In my first position, I was the only staff person. I worked directly with 150 volunteers, and together we supported 700 volunteers who delivered Scouting to 2500 youth. In later years, I worked with a board of 100, and in one CEO assignment, I worked with 25,000 volunteers to serve 80,000 youth. Throughout those 40 years, I had this motto on my desk: Good volunteer-professional relationships are characterized by mutual trust, mutual respect, and mutual recognition of each other's role and competency. In my current role with ESCCO, we have been characterized as having an unusually congenial relationship between and among staff and volunteers. That doesn't just happen; we work at it.

What is an organizational culture?

Organizational culture is defined as having a system of shared values, understandings, and perspectives that are held in common by the whole team.

An organization's culture can distinguish it by fostering a collective behavior that encourages employees to determine which things get done, how they get done, and who does them in the most productive way.

It's not about whether your workplace is fun, or whether you go bowling.

Culture requires constant care, intentionality, and commitment.

Your nonprofit culture consists of three things: Your shared values, Your mission and vision, and How you value your people.

Answer these questions: What is the importance of work-life balance, and do we mean it? What do we value more, and less? What is appropriate work behavior, and what is not?

Another perspective, when it comes to people, whether staff or volunteer: How do we hire and fire? What behaviors do we reward? How do we communicate, implicitly or explicitly? What is our view on personal sacrifice? How is failure treated? Do you operate in silos or encourage open collaboration? Do we nurture our employees or volunteers personal growth?

To the extent that the understanding and beliefs of your team align in such answers, you have a culture.

Why is a defined culture important in a nonprofit?

"Why defining your nonprofit's culture will be the most important thing you do this year"

"Why designing your nonprofit culture is do or die"

Really? Is it that big a deal? Jason Cohen, founder of WP Engine, says "Every company has a culture. The only question is whether or not YOU decide what it is."

No matter its mission or size, it's important for every nonprofit to have a set of core values, beliefs, and perspectives that defines how people do things in the organization.

Is this new thinking to you, or just stating something you've always known on some level?

What are the levels of organizational culture?

Author Edward Schein says that organizational culture can be observed at three different levels:

The most visible are artifacts, which includes observed behavior, such as décor, work attire, meeting behavior etc.

Next are the espoused beliefs and values, such as mission, vision, and value statement, goals, etc.

Finally, tacit assumptions – strongly held and taken for granted values, beliefs, and perceptions that operate at the unconscious level. These are the most difficult to discern.

Some questions to ask in defining your organizational culture:

What is the atmosphere like in our working environment?

How do we communicate with each other and our donors?

How do our team members work? Independently? Collaboratively? Both?

How do we define our work hours? Flexible or set? 9 to 5 or all-nighters?

What is our decision-making process? Do one or two people make all the decisions?

How do we define our approach to our work and our mission? Does our system work?

Everyone should have an opportunity to contribute to these discussions, but leadership must lead. Take a look at your personal practices and see if you want them reverberated throughout your organization. Transparency? Communication? Welcoming feedback?

Does your team have high visibility into where your organization is currently, and where it's headed in the future?

Air BnB CEO Brian Chesky says, "We have the power, by living the values, to build the culture."

If you don't unite your nonprofit culture around a consistent, inspiring mission, it will be hard to achieve unity of action.

A really good mission statement doesn't exist just for your constituents or your marketers, but ideally it actually helps your organization internally to guide your daily decision-making?

Who'd like to share some examples of the culture at your ESC affiliate?

Bonus: www.minnesotanonprofits.org offers a free 40-page document on their website, Principles and Practices for Nonprofit Excellence.

They list 19 practices that will build an excellent nonprofit. Six are about decision-making, four are about communication, and nine are about culture. Some examples from among those nine:

Nonprofit leaders should continually develop the skills, knowledge and abilities of others at all levels of the organization to take on greater responsibility for carrying out the organization's mission and engaging community members.

Nonprofit leaders should foster a culture of information and sharing between the board and others in the organization so that innovation and creativity can come from diverse parts of the organization.

Nonprofit leaders should encourage their organization's staff and board to seek out, recognize, and leverage both the shared and different values of diverse cultures.

Where do volunteers come in?

We've all been asked to sign a memorandum of understanding as an ESC affiliate. In it, we promise to utilize volunteers to provide consulting/coaching/counseling services. And we each work with a Board. So we are already in the volunteer arena.

Here are three behavioral categories we should observe regarding our organizational culture's support or hindrance of volunteers:

Perception of volunteers: Are the conversations about volunteers positive or derisive? Are volunteers an afterthought or prominent in conversations regarding planning, resource development, etc? Regardless of your organization's size or budget, is there a system for managing volunteers?

Treatment of volunteers: Excluding board members, are volunteers welcomed and involved in professional conversations? Is there social interaction between regular staff and volunteers, such as sitting together during meetings or meals?

Recruitment and retention of volunteers: Do volunteers often leave before their service term is over? Do new volunteers come because your organization has been recommended by previous or current volunteers?

Two resources to learn more about this are Edgar Schein's *Organizational Culture and Leadership*, and Paige Hull Teegarden's *The Nonprofit Organizational Culture Guide*.

We train volunteers on how we would like our agency to perform and tell them too little about how it actually works. To the extent that we withhold or disguise the organizational culture from our volunteers, we set them up for failure.

The job of socialization should begin in the planning and recruitment stage. The staff member tasked with managing volunteers must develop a clear notion of the organizational culture and volunteer needs, in order to determine a profile of the volunteers that will be compatible with the tasks to be done and the organizational culture they will be entering. The staff person should communicate not only the skills needed, but the personality style, attitudes, and beliefs necessary to succeed in the agency.

Resources:

Classy.org/blog/why-defining-your-nonprofits-culture...

NonprofitHub.org/starting-a-nonprofit/designing-your-nonprofit...

Connecticut Association of Nonprofits: The Power of Nonprofits – Analyzing the Organization’s Culture

NonprofitQuarterly.org/2014/07/28 – Toward a Nonprofit Theory of Leadership and Organizational Culture

[LinkedIn.com/pulse/organizational-culture-retains-volunteers](https://www.linkedin.com/pulse/organizational-culture-retains-volunteers)

MassNonprofit.org/organizational-culture-impacts-your-volunteers

EnergizeInc.com/art/organizational-culture-and-volunteer-programs

Edgar Schein’s Organizational Culture and Leadership

Paige Hull Teegarden’s The Nonprofit Organizational Culture Guide

Questions/comments during Paul’s presentation:

Paul: Describe your culture

Julie: Transparent

Trudy: Respect/inclusiveness

Burt: Common values

Burt: We don’t see our volunteers that often. (There are two people in the office and 50 volunteers) It’s hard to keep the volunteers motivated when they’re not on projects.

Darlyne: We struggle with the same thing in Cincinnati. We offer volunteers an opportunity to do internal projects, offer more training, have free quarterly member luncheons. If they are not engaged enough they sometimes leave.

Julie: We have the same thing. We have a newsletter, lunch and learn. On the other hand, we have consultants that leave for extended periods and aren’t available for projects so we have to have a large enough pool to accommodate that.

Yvonne: We have the same problem.

Paul: Do you have member dues?

Trudy: No. Our volunteers give a lot of money so we don’t have member dues. They’re engaged a lot.

Vicky: We have multiple roles for volunteers: advisory Council, internal projects, work with 501 Commons, give awards to consultants. We have thought partners.

Michael: We have just a small handful that contribute anything. Most don’t contribute.

Vicky: The chair of our advisory council sends a letter to all consultants asking for donations.

Julie: We’re happy with our giving. We received donations from 85 out of 150 consultants. We stress time, talent and treasure.

Trudy: I’ll be happy to share our ask letter with all of you.

Vicky Foxwoth, VP of Organizational Consulting, ESC of Southern California

We have three buckets of engagement for our volunteers: Fantastic Learning Opportunities, Opportunities for Connection and Community and Deeper Engagement Opportunities to Directly Support ESC.

Fantastic Learning Opportunities : Some learning opportunities include “best in class” training modules, tools and templates, quarterly professional development, consultant matches (new volunteers are paired up with different consultants). Volunteers also value the exposure to multiple types of nonprofits in our community. One volunteer told us how impactful this exposure is to him. “It fills up my life,” he said.

We evaluate every consulting engagement and give positive and constructive feedback. Our consultants have asked for this feedback. They are motivated to keep learning and growing.

Opportunities for Connection and Community : Senior consultants serve as mentors for junior consultants.

We have multiple celebration events that we do not charge for: 1) the Annual State of ESC – transparency – shows the impact of their work; 2) “Day in LA,” - we rent a bus and go to three different client sites. Most inspiring event. 3) Esprit de Corp is an afternoon even held at one of our volunteer’s homes. Staff set up the house. We invite volunteers, their spouses and/or partners. 4) Annual volunteer luncheon – cost to us is \$10K (we try to get sponsors to cover.) We name 2-3 “consultants of the year” and give a lifetime achievement award. Other examples include our training cohorts getting together, some have formed a book group and friendships have developed where volunteers and their spouses have dinner together.

Deeper Engagement Opportunities: we meet quarterly with the advisory council to brainstorm and discuss their reaction to ideas we are proposing. For instance, we discussed “how we define the role of the volunteer.” We bat out the details together.

Only one of our board members is an ex officio volunteer consultant. By keeping our board free of ESC volunteers we are able to get a clearer picture of where we stand and how we can improve.

We ask for nominations for CEO of the year (client) and give him/her award of \$1,000.

The volunteers are involved in our strategic planning process.

Up to seven consultants brain storm with us through a challenge we’re facing.

And we thank our volunteers all the time.

Questions/Comments:

Julie: Do you see a change in who is becoming a volunteer? Do you employ e-learning devices?

Vicky: the trends around volunteers: 1) we target organizational development/leadership sector. The pro is they bring a lot of knowledge and the con is they have their own consulting practices. We are also bringing in younger volunteers (25-40 years old) who indicate that they have flexibility in their schedules. Most of these have not worked out.

Trudy: we have a dedicated staff person to onboard new volunteers. Ann is working with Carter McNamara (<http://www.authenticityconsulting.com/principals.htm>) on a project that may be rolled out to other ESCs.

Julie: We are attracting younger volunteers, as well (50-60 year olds)

Yvonne: We have problems with some consultants having a conflict of interest

Vicky: We do verbal contracting where we ask that a new volunteer commit to volunteering with us 2-3 years.

ESC Southern California – Volunteer Engagement and Appreciation

Miscellaneous Facts

Close to 100 volunteers – with life events about 85 or so available at any one time
Many involved in 2, 3 or even 4 engagements
Senior consultants play an informal mentoring role with new consultants
Bring on new cohorts once or twice per year (multi-stage vetting process and 5 full-days of mandatory training)
Proactively reach out – working to diversify our corps

1. Fantastic learning opportunities

Best-in-class training with detailed training manuals and tools for all service areas
Quarterly professional development
Training through our Institutes
Learning from other consultants (we create intentional opportunities)
Learn about the nonprofits that impact our community – a real win for many
Direct feedback to consultants on all consultations based on our ongoing evaluation initiative – something consultants asked for

2 . Opportunities for connection and community

Partner with one or two consultants on all consultations (with the exception of leadership coaching)

Multiple community building events (no charge for any events including for spouses) - feeds them intellectually and socially, individually and collectively

Annual State of ESC followed by 1/2 of professional development (high turn outs – they care about where we are and see themselves as “part of us”)

Day in LA (large buss of consultants brought to three client sites – very impactful, consultants connect in new ways on these journeys)

Espirit de Corps (spouses invited)

Annual Volunteer Appreciation Luncheon – approximately 5-6 consultants awarded each year in various categories - consultants of the year, consultant who has put in exceptional effort supporting ESC, lifetime achievement, ED of the Year (spouses invited)

Some unplanned/unstructured (no involvement from ESC staff) by ESC staff community building outcomes based on our organizational culture – cohorts of new consultants who decided to have lunches every other month,

consultant teams who have become friends and have scheduled monthly dinners dinners, a book group, couples dinners, lunches with coaches and clients for multiple years)

3. Deeper Opportunities to support ESC Directly

Consultant Advisory Council (CAC) - 8-9, meets quarterly, rolling terms of 2 years

Chair serves as ex-officio on the Board, no consultants on our Board so they can be direct and honest about continuous improvement efforts

Committee to collect nominations for top ED of the year

Database design support

Leading ESC in our strategic planning

Helping recruit a more diverse consultant pool

Coaching for one of our staff by one of our consultants

CAC Chair writes to fellow consultants annually to donate to ESC

Paul: We may want to think about offering organizational culture as a service to our clients.

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July 20, 2016

Dear ESC Consultants,

Ten years ago, ESC's board took a chance on me – a middle-aged mom with two toddlers and no paid experience in the nonprofit sector. I was hired as the part-time ED and worked with my assistant, Shirley Ellis, in a tiny office space donated by Duke. About a dozen committed consultants did 80% of the consulting engagements, and ESC operated on about \$30,000 a year. Every day I was excited about my job because I got to work with our talented and enthusiastic consultants – matching their skills and expertise with the vibrant nonprofits in our community who needed our help. Ten years later, ESC is a very different place, but I still feel the thrill of our collective work, thanks to you!

Research shows that a person who volunteers for an organization is more likely to donate funds to the cause because they appreciate the importance and value of the agency's services. ESC board members often hear your stories – stories of meeting nonprofit EDs, staff and board members who are struggling daily with keeping their mission and passion alive and how you help them. Our board gives because they believe in the work that you do to improve our community, and all of our board members donate to ESC. Hopefully your work will inspire you to do likewise.

We are lucky to have a talented and supportive staff, as well as volunteers who share their training and expertise with us. ESC efforts are works in progress as we constantly search for improvement by evaluating ourselves, our methods and tools and our results. As we expand our staff time, volunteer support, communications, scholarships and community impact, our funding needs to increase.

Your time, skills and commitment are the best of your gifts. I hope that this year you will also support ESC with your financial donation and join me to ensure more opportunities to improve and enjoy our community.

Thank you again for all you continue to do.

For your dedication to ESC, I am truly grateful.

Trudy Smith

Your Executive Director

November 17, 2016

Name

Address1

Address 2

City, State, Zipcode

Dear FIELD (First NAME),

Thanksgiving season is my favorite time of year. At my home traditions of gathering family and friends to feast at a table laden with our favorite “must have” dishes, coupled with folks around the table giving thanks for who and what matter most in our lives feeds my soul. I am truly nourished and sustained through these rituals.

At my office, I also wish to give thanks, and my thanks are to you for your incredible generosity to ESC. Your gifts have permitted ESC to enhance the impact of nonprofit organizations around the region, work that is nourished and sustained by gifts from a community of donors like you.

On October 31st we kicked off the ESC season of thanks at our Annual Celebration of Service by remembering a recently deceased consultant who gave and then gave some more; by celebrating the accomplishments of five dedicated volunteers; and by recognizing the service of all our consultants and Encore fellows. Clients shared their thanks for the guidance they’d received from ESC consulting teams, guidance which has helped The Discovery Museums increase visitors and supporters, Crossroads serve more children and Talking Information Center serve more visually impaired adults.

The Annual Celebration had that Thanksgiving feeling, but the contributions of the ESC practice are so much greater than we can possibly acknowledge at one event. Some other recent successes include:

- in Hyde Park, our crisis aversion plan helped a new executive director keep the lights on and the doors open to stabilize services to Haitian immigrant and refugee youth;
- in South Boston, we created a business plan for an organization providing employment services to chronically unemployed and underemployed adults;
- in Boston, we developed an implementation plan for the first law center in the nation dedicated solely to providing legal representation to victims of sexual assault.

Our consulting services are made possible by the donated services of our consultants, and grants and individual donations which subsidize every project by at least 50%. As many nonprofits face an uncertain future, ESC’s ability

to leverage the experience of our exceptional volunteers is more valuable than ever. Our work, indeed your work, will be essential to the continuation and expansion of services that are desperately needed.

Thank you for your last gift of **FIELD** to ESC. I hope that today you will consider a gift of **FIELD** to support ESC's transformative impact at 75+ nonprofit organizations each year. With your financial support, ESC of New England will address problems with solutions and strengthen the fabric of our communities.

Sincerely yours,

Julie Crockford

jcrockford@escne.org

FOR CONSULTANTS AND FELLOWS ONLY

P.S. Help us reach a goal of 100% participation among our family of consultants and fellows. You know best what ESC has meant for you and your commitment to building a better world.