Building Leadership for ACT
Five Key Elements of Volunteer-Led Organizations and Recommendations for the Stanford Alumni Consulting Team

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Executive Summary

For over two decades, the Stanford Graduate School of Business (GSB) Alumni Consulting Team (ACT) has been providing pro bono consulting teams to nonprofit organizations across the San Francisco and Monterey Bay Areas. Conceived with a dual mission of fostering an ongoing connection between the GSB and its alumni while giving back to the local community, ACT has engaged more than 1,200 alumni and served over 500 nonprofit organizations since 1987—and has received overwhelmingly positive reviews from community recipients and alumni volunteers alike.

Building Leadership for ACT (BLACT) is a project led by two members of the ACT Advisory Board with the goal of increasing the quantity and quality of volunteer leaders within the ACT community. Increased volunteer leadership is needed for two reasons:

1) **ACT lacks sufficient project leadership to staff available projects.** While there generally has been no shortage of ACT volunteers, there are frequently too few project leaders, which requires ACT staff to turn down otherwise-worthy nonprofit project proposals. In recent rounds, ACT has provided at least 15% less community support than it could have if there were a larger pool of available project leaders.

2) **ACT lacks sufficient organizational leadership to meet its potential on either the community impact front or the serving alumni front.** While ACT was founded and originally led by alumni volunteers, for most of its history paid staff members have carried out most day-to-day functions. Over the last decade, volunteer involvement in the organizational management of ACT has declined significantly, resulting in a body of alumni volunteers who enjoy participating in ACT programs but do not feel a sense of responsibility for ACT. Those alumni who do take more ownership of ACT (e.g. advisory board members) must frequently prioritize team leadership over organizational leadership, given the shortage of project leaders.

With staff completely occupied carrying out day-to-day functions and the core group of committed volunteers tapped continually to satisfy project leadership needs, there is little time or energy for growing the organization.
BLACT Methodology

In the course of this project, the BLACT team has undertaken primary and secondary research to develop its recommendations for addressing the leadership shortage within ACT. We believe this is a distinguishing feature of this project in relation to others conducted by ACT in the past. Thus, BLACT team members have investigated the common elements of volunteer-led nonprofit organizations (e.g. the Mormon Church and Girl Scouts of America) and pro bono consulting organizations (e.g. HBS Community Partners), reviewed previous ACT studies and discussions about building its leadership, investigated resources within the GSB that would help support leaders, and read relevant books and articles.

Findings

The BLACT team identified five key elements of volunteer-led organizations and consulting firms that build and strengthen their organizational leadership, including:

1. **Recruitment**: Identifying volunteers thought to be interested and capable of joining an organization’s leadership community and attracting them to do so.

2. **Engagement**: Providing volunteers with programs, pathways and reinforcement to strengthen their involvement with the organization.

3. **Support**: Providing a set of resources—information, training, tools, forums and mentors—that enables leaders to be more effective and confident and ready to cope with challenges that may arise.

4. **Integration**: Nurturing the relationships between leaders and the organization and among leaders with one another. Integration is also about the relationship between a volunteer’s experiences with the organization and how that supports and enhances other aspects of his or her life.

5. **Communication**: Selecting the basic messages that reinforce a volunteer’s commitment to the organizational community, determining how best to deliver those messages to the target audience, and doing so.

Having identified the five key elements listed above, BLACT members reviewed ACT’s current and past efforts to build volunteer leadership before developing a set of ACT-specific recommendations for each of these five elements (see following report). The BLACT team is confident, based on its research, that progress in these areas will lead to a larger, more active, and sustainable Alumni Consulting Team that can measure its success not only in engaging alumni, but also in terms of broader community impact.
Introduction

Background

The Stanford Alumni Consulting Team is marking its 22nd anniversary in 2009. In its history, ACT has established a remarkable track record. More than 1,200 alums have volunteered to provide pro bono consulting to over 500 nonprofit organizations in the San Francisco and Monterey Bay areas. The estimated value of this service for the fiscal year 2009 is $3.4 million. Moreover, many of the nonprofits that have benefited from ACT are repeat clients. Over the four project rounds in 2007 and 2008, 54 ACT clients reported an average satisfaction rating of 6.4 on a scale of 1-7 (where 7 is “very satisfied” with the project experience.)

Volunteer leaders have been central to ACT’s success and longevity, serving in the following capacities:

- **Project leaders**: 148 people have volunteered to lead or co-lead projects since 2000, 68 more than once. Initially called “partners” and now “project leaders,” these individuals are responsible for developing a work plan for a project, writing the project description used to recruit the team, committing to complete the project, managing all aspects of the team and its relationship with the client, and evaluating the project and team members upon completion.

- **Operations managers**: In the past, volunteers have worked with staff to manage basic components of the program, including screening projects, conducting follow-up evaluations, cultivating project leaders, and raising funds. However, as the GSB has provided more staff and financial support for the program, volunteers have become less essential to the operational functions of ACT. Since 2000, volunteers have rarely assisted with operational assignments. Instead they have mainly served in advisory capacities, occasionally undertaking ad-hoc projects.

A few volunteers participate in non-client support roles. Richard Knock, MBA 1962, collects and shares information about ACT volunteers with the class secretaries of the Stanford Business magazine. Other alumni volunteer as mentors, trouble-shooting project leaders and Ask ACT experts.
**BLACT Methodology**

BLACT’s method was to develop recommendations based on:

- Study of how volunteer-led organizations attract, develop and retain leaders;
- Research into nonprofit consulting organizations to see how they recruit, train, and structure the role of project leaders;
- Review of previous ACT studies and discussions about building the leadership pool;
- Investigation of resources within the GSB that would help support leaders; and
- Reading selected relevant literature.

To ensure a balanced point of view, BLACT leaders assembled a team to include volunteers with a variety of backgrounds, including team members who are project leaders, Advisory Board members, team members, ACT volunteers with various lengths of involvement with the organization (including none at all), employees of nonprofit organizations that work with volunteers, volunteers with professional consulting backgrounds, and representatives of various life and career stages.

We want to note especially the past efforts that others have made with respect to building ACT’s volunteer pool and leadership pool.
Building Leadership for ACT Report

Findings

We identified from our research five elements that volunteer-led organizations use to attract and retain volunteer leaders. They are:

1. **Recruitment**: Identifying volunteers thought to be interested and capable of joining an organization’s leadership community and attracting them to do so.

2. **Engagement**: Providing volunteer with programs, pathways and reinforcement to strengthen their involvement with the organization.

3. **Support**: Providing a set of resources—information, training, tools, forums and mentors—that enables leaders to be more effective and confident and ready to cope with challenges that may arise.

4. **Integration**: Nurturing the relationships between leaders and the organization and among leaders with one another. Integration is also about the relationship between a volunteer’s experiences with the organization and how that supports and enhances other aspects of his or her life.

5. **Communication**: Selecting the basic messages that reinforce a volunteer’s commitment to the organizational community, determining how best to deliver those messages to the target audience, and doing so.

Recommendations

We offer recommendations of specific initiatives for each of the elements above. In developing these recommendations, we considered techniques commonly used by other organizations and selected those which hold potential promise if adopted by ACT. These are described in the five sections that follow. [The recommendations are particular to ACT and not especially relevant to other organizations; therefore, they have been deleted from this document, which is intended for distribution outside of the ACT community.]
Recruitment

Definition

Recruitment entails identifying alumni thought to be interested and capable of joining ACT’s leadership community and attracting them to do so.

Common recruiting practices

The volunteer-led organizations and pro-bono consulting groups we reviewed make recruiting new leaders a priority. Common practices include:

- Publicizing leadership opportunities and making the recruitment process explicit to everyone in the organization (by publicizing the process, when it is occurring and the pathways by which people can increase their involvement as leaders);

- “High touch” (i.e., personalized) cultivation, which includes treating prospects as “stakeholders” by soliciting their feedback and ideas about the organization as well as whether and how they would like to become more involved vs. “volunteers” who are recruited merely to do a particular job;

- Establishing recruitment committees;

- Expecting current leaders to recruit their replacements;

- A “strong start” (e.g., orientation sessions and “how-to” binders) for leaders, minimizing the learning curve and boosting confidence about taking on leadership jobs; and

- Eligibility requirements for consulting project leaders: either extra training or a separate, more selective recruitment process requiring an application. We did see more selectivity in organizations that had a more diverse group of volunteers (e.g. Taproot Foundation).
**Engagement**

**Definition**

Once volunteer leaders have been recruited, ACT needs a way to retain them and deepen their involvement with the organization. As we define it, *engagement* includes programs, pathways and reinforcement to encourage and facilitate increasing commitment to and involvement with the organization.

**Common practices for volunteer engagement**

The volunteer-led organizations and *pro bono* consulting groups we reviewed have multiple approaches for engaging volunteers and building volunteer commitment, including the following:

- **Abundant opportunities for volunteer leadership**: Organizations we talked with are truly volunteer-led, encouraging us to think that more of ACT can be led by our volunteer leaders. They typically had diverse opportunities for leaders, including both project-based opportunities and continuous leadership roles. They also had transparent pathways to organizational engagement and leadership.

- **Ongoing “high-touch” cultivation**: High-touch cultivation doesn’t stop once a volunteer enters an organization. Leadership cultivation, support and community building require personal contacts, 1:1 relationships, and often mentoring relationships.

- **Consistent recognition**: One of the keys to volunteer retention is acknowledgement of their efforts, especially when that acknowledgement causes them to feel that they are making a difference.

- **Fun**: Volunteer-led organizations seem to make things fun, in addition to productive—they want people to look forward to being involved and look back on enjoyable experiences.

- In addition, three common engagement practices, **support, integration** and **communication**, are so important that we have researched them in-depth and devoted entire sections to them.
Support

Definition

Support entails providing a set of resources—information, training, tools, forums and mentors—that assist ACT project leaders, enabling them to be more effective and confident and ready to cope with challenges that may arise. Providing support to project leaders both encourages prospective leaders to take on a leadership role and makes it more likely that ACT teams will deliver high-quality recommendations to clients.

Common support practices

The volunteer-led organizations and consulting groups (both for-profit and pro bono) that we interviewed and reviewed in the research phase of this project provide extensive support for their project leaders and other leaders. Among the consulting organizations, we found a direct inverse correlation between the amount of training and support provided and the homogeneity of the volunteer and leadership pool. For example, groups accepting only MBA graduates provided support that built on assumed minimum levels of training in those programs. Taproot, which specializes in certain types of highly structured projects, orients its support to specific project methodologies.

Common practices include:

- One or more training sessions specifically for project leaders, with prospective leaders often required to attend courses before they can lead, and experienced leaders required to have additional training to advance to higher leadership levels.
- Multiple series of training sessions covering a variety of topics.
- Extensive tools, templates, guidelines and reference materials on websites for leaders.
- Web-based forums for leaders to ask/answer questions and share best practices.
- Formal mentorship programs, primarily for new leaders, that continued as they gained experience.
Integration

Definition

Integration is about nurturing the relationships among alumni, as well as the relationships between alumni and the GSB. Integration is also about the relationship between a volunteer’s ACT experiences and other aspects of his or her life. For example, if an alum becomes a better ACT team leader as a result of ACT training and experiences, she or he may well be a better team leader at work and in other community activities.

Common practices

The Forces for Good authors found that integration is a major emphasis among the high-impact organizations that they studied. Among the highlights of Chapter 4 are these extracts (emphasis added):

- The best groups move beyond mere individual engagement to create larger communities of supporters. Communities are treated as ends in and of themselves.
- Once you’ve built a larger community, cultivate it over time by providing ways for members to connect through conferences, communication tools, technology, and alumni programs.

Among the volunteer-led organizations that we researched, following are some practices that are relevant to integration.

- **Junior League:** The women of this organization volunteer together to address specific needs in their community. In doing so, they gain leadership training and experiences that enable them to have an impact in their communities through leadership in other organizations. The international organization, AJLI, has embarked on a strategic planning project described on their website: ... to ensure the future of an organization that has contributed to the development of women as civic leaders ...

- **The Mormon Church:** Religious groups are, manifestly, organizations that attract people who share values with one another and choose to associate with one another. We specifically considered the Mormon Church and learned that that organization’s programs place great emphasis on integration. Specific to the point of volunteer leadership, our interviewee noted that the most dedicated leaders are those who feel the most personally connected to the church and to the Mormon community.

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• **The American Red Cross Disaster Services Teams:** The Disaster Services teams of The American Red Cross experience significant volunteer turnover; however, the leadership core has almost no turnover. Our interviewee said that many of the ~25 volunteer leaders in his chapter have been with Disaster Services for 15 years and more. The local chapter does not have specific activities that focus on integration; however, event organizers do recognize that the social interaction among participants is important. So, for example, at bi-monthly Disaster Services meetings of all Disaster Services volunteers, 20% of the meeting time is reserved for social time. Every other month, the volunteer leaders get together for a potluck dinner and 30 minutes of those meetings is for social interaction. In addition, the chapter uses newsletters to help volunteers to stay connected with the organization.

• **SV2:** SV2 is a membership-based grant-making organization that involves its members (called “partners”) in its grant-making process, oversight and advising, so that its partners can be more effective in other aspects of their lives, especially as philanthropists. SV2 trains, coaches and mentors its partners and provides opportunities for personal interaction and bonding. When new partners join, SV2 learns about their personal interests and activities “to understand what they are passionate about”—and then looks for ways to integrate SV2 programming with these passions. For example, some partners expressed interest in involving their children in philanthropic programs, so SV2 initiated *SV2 Teens.* Another integration-oriented program is SV2’s Board Service training program. SV2 also has social events so that people develop or sustain friendships and thus look forward to the working meetings more because they are among good friends.
**Communication**

**Definition**

Communication involves selecting the basic messages that reinforce a volunteer’s commitment to the organizational community, determining how best to deliver those messages to the target audience, and doing so.

**Common communication practices**

The main communication practice that we saw across organizations we researched is the use of an e-newsletter. SV2, the Red Cross, and the Mormon Church distribute relatively simple and straightforward newsletters fairly frequently. Typically they are monthly; however, some are weekly or biweekly. Other organizations like the Junior League and Girl Scouts are more sophisticated and employ email communications targeted at different groups of volunteers and leaders based on their functional group or interests. Some groups have robust websites for sharing information—not unlike what ACT has now. Finally, several organizations use in-person meetings to communicate with their leaders. Some of these are monthly; others occur at the organizations’ annual conventions.
Conclusion

When we embarked on this project to address the challenge of developing more leadership for ACT, we committed to a research-based approach inspired by Forces for Good. This involved studying how other organizations build volunteer leadership and then applying what we found to ACT. We have stayed true to that commitment.

We found in our research many practices that were promising. At one point we put thirty of the most promising practices on note cards and stuck them on a wall so we could sort them into logical groupings. From those we distilled five elements that volunteer-led organizations use to attract and retain volunteer leaders, namely recruitment, engagement, support, integration and communication. Working with each of these elements, we identified some twenty-nine recommendations in total, and seven implementation steps. These are solid, evidence-based recommendations that upon implementation should make a significant difference in developing and sustaining ACT’s volunteer leadership.

We expect that as our recommendations are instituted, ACT will evolve and become a sustainable community of alumni sharing common purpose. Its members will engage because they are welcomed, valued and supported. They will grow and develop personal connections while they change the world one project at a time. We are prepared to participate in the implementation process.

Very truly yours,
Katie, Jim, Lindsay, Tony, Jon and Bruce