Association Volunteer Program Benchmarking Study

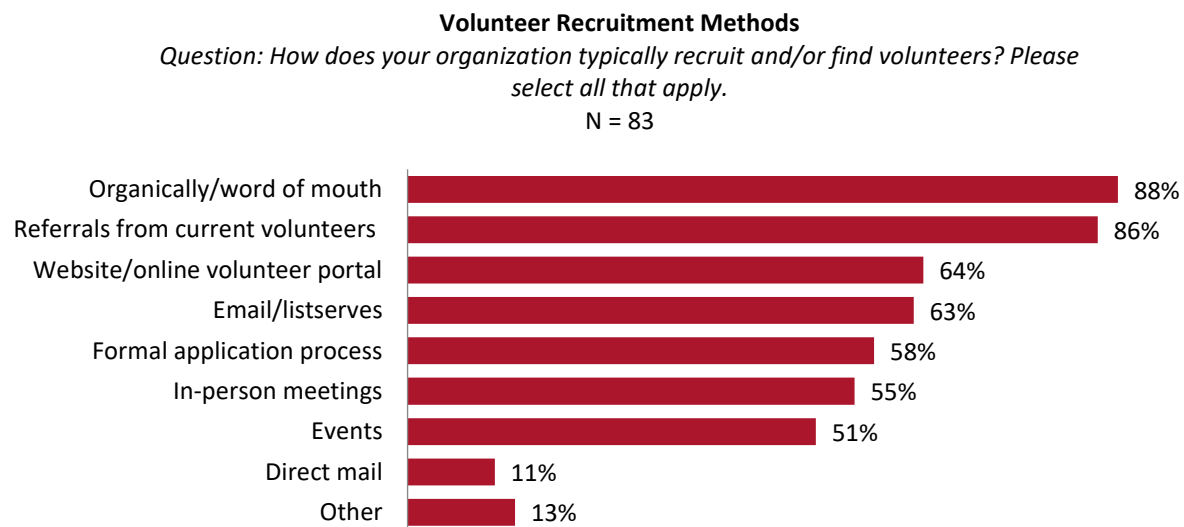look   learn   plan   deliver

Introduction

The Institute of Electrical and Electronics Engineers (IEEE) retained McKinley Advisors to conduct a benchmarking study to identify effective and common practices for tracking and measuring the volunteer experience. As part of this study, McKinley deployed an electronic survey in summer 2016 to over 600 association contacts and received 96 responses representing a broad range of industries, volunteer structures, and organizational sizes. Survey responses are supplemented with redacted case studies uncovered through in-depth interviews with association executives. The following report summarizes key findings from the research.

Key Research Findings

VOLUNTEER RECRUITMENT METHODS

Word of mouth was the top method in which participating organizations recruit volunteers. Eighty-eight percent of respondents noted that their organization finds volunteers "organically" or through word of mouth, while 86% reported that volunteers come to their organization through referrals from current volunteers. Other top methods for recruitment included using the organization's website or online volunteer portal (64%) and emails or listserves (63%).

Volunteer Recruitment Methods

Question: How does your organization typically recruit and/or find volunteers? Please select all that apply.

N = 83

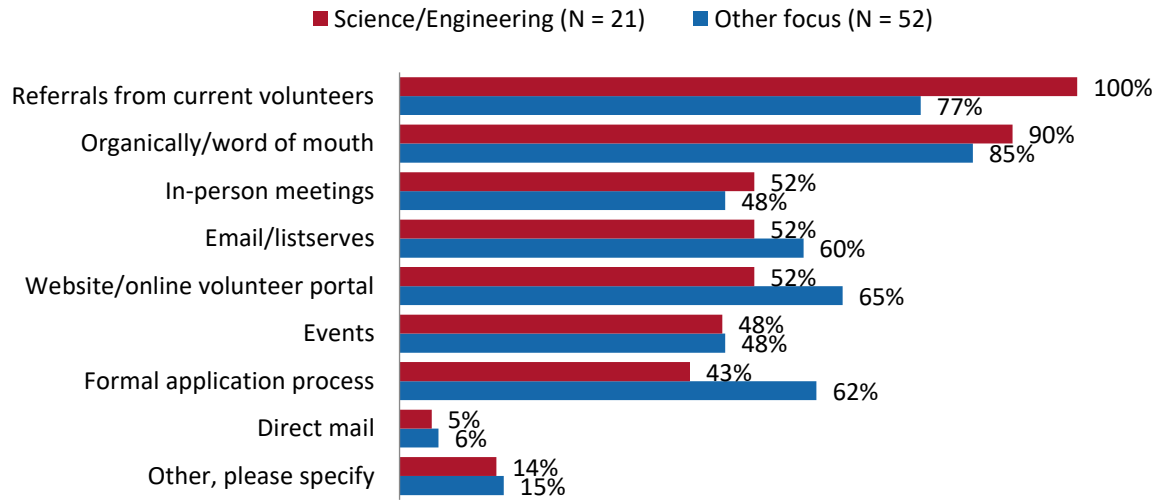| Method	Percentage
Organically/word of mouth	88%
Referrals from current volunteers	86%
Website/online volunteer portal	64%
Email/listserves	63%
Formal application process	58%
In-person meetings	55%
Events	51%
Direct mail	11%
Other	13%

Participants from larger organizations (annual revenue of $51 million or more) were more likely to report that their association recruits volunteers through a formal application process (69% compared to the overall average of 58%). When segmented by area of focus, Scientific/Engineering societies were more likely than associations with other areas of focus to indicate that word of mouth was a top volunteer recruitment method. In fact, for Scientific/Engineering societies, referrals from current volunteers were noted as the top recruitment method (100% compared to 77% of associations with a focus other than Scientific/Engineering). Similarly, 90% reported that their organization generally finds volunteers organically or through word of mouth (compared 85% of associations with another area of focus). Conversely, participants representing non-Scientific/Engineering societies were more likely to note that their organization recruits volunteers

through their website or online volunteer portal (65% compared to 52% of Scientific/Engineering societies) and through a formal application process (62% compared to 43% of Scientific/Engineering societies).

Volunteer Recruitment by Organizational Focus
Question: How does your organization typically recruit and/or find volunteers? Please select all that apply.

■ Science/Engineering (N = 21)   ■ Other focus (N = 52)

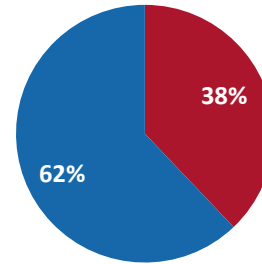| Category	Science/Engineering	Other focus
Referrals from current volunteers	100%	77%
Organically/word of mouth	90%	85%
In-person meetings	52%	48%
Email/listserves	52%	60%
Website/online volunteer portal	52%	65%
Events	48%	48%
Formal application process	43%	62%
Direct mail	5%	6%
Other, please specify	14%	15%

TRACKING AND MEASURING VOLUNTEER METRICS

The majority of participants (62%) reported that their organization does not regularly track or measure volunteer satisfaction. This was slightly lower for participants from societies with a Scientific/Engineering focus (29%) while participants from organizations with another focus were more likely to report that their organization regularly tracks/measures volunteer satisfaction (42%).

Volunteer Satisfaction Practices
Question: Does your association regularly track/measure volunteer satisfaction?
N = 87
■ Yes, tracks/measures volunteer satisfaction
■ No, does not track/measure volunteer satisfaction

38%
62%

A crosstab analysis also revealed that larger organizations (in terms of budget) were more likely to report the regular tracking/measuring of volunteer satisfaction. In fact, over half of participants from larger organizations (budgets of $51 million or more) indicated that their organization regularly tracks/measures volunteer satisfaction compared to just 23% of participants from organizations with a budget of $10 million or less.

Tracking Volunteer Satisfaction by Organizational Budget
Question: Does your association regularly track/measure volunteer satisfaction?

■ % regularly tracks/measures volunteer satisfaction

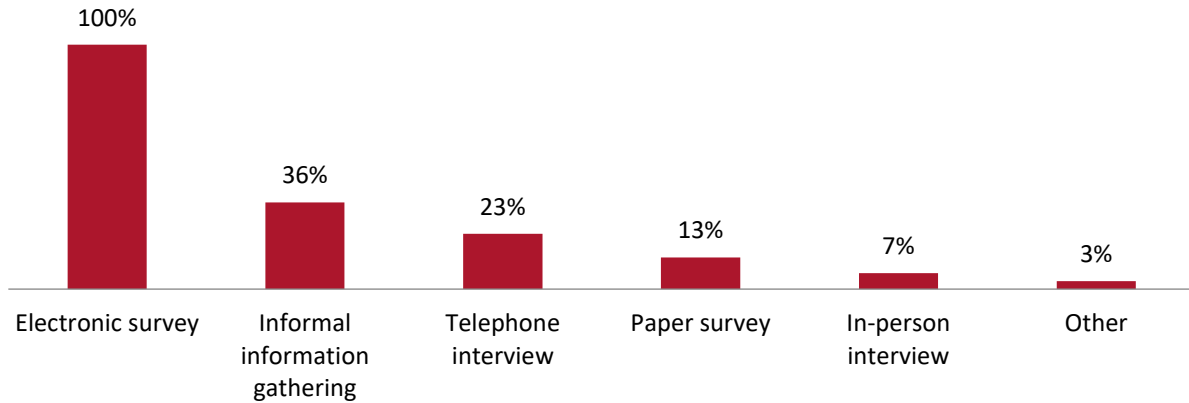| $10 million or less (N = 26)	$11 - 25 million (N = 20)	$26 - 50 million (N = 16)	$51 million or more (N = 13)
23%	40%	50%	54%
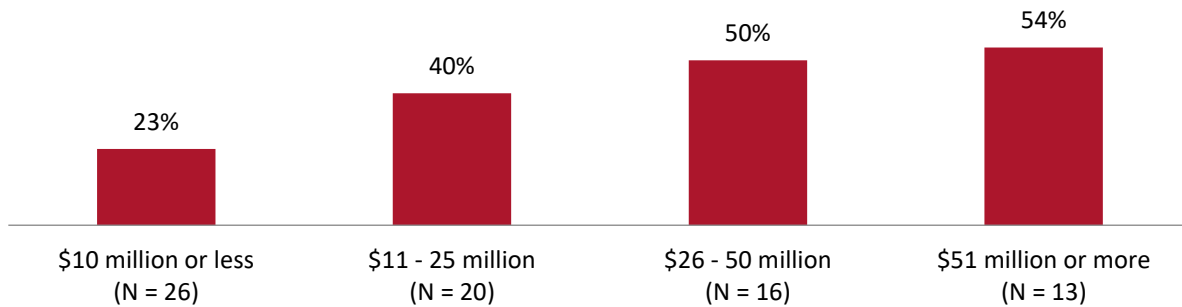
Of the 38% who reported that their organization does regularly measure satisfaction, the most common method, by far, was through an electronic survey (100%) that is most often administered annually (65%) or every few years (19%). The next most common method for tracking volunteer satisfaction, informal information gathering (36%), is typically conducted by respondents on an ad-hoc basis (56%).

Volunteer Satisfaction Measurement Methods

Question: How is satisfaction tracked or measured? Please select all that apply.

N = 31

Electronic survey	Informal information gathering	Telephone interview	Paper survey	In-person interview	Other
100%	36%	23%	13%	7%	3%

Frequency of Tracking Volunteer Satisfaction by Method

Question: How often is satisfaction tracked or measured?

N = 31

|	At least monthly	Quarterly	Annually	Every few years	Ad hoc/As needed
Electronic survey	0%	10%	65%	19%	7%
Informal information gathering	22%	0%	22%	0%	56%
Telephone interview	0%	14%	43%	29%	14%
Paper survey	0%	0%	0%	75%	25%
In-person interview	0%	0%	100%	0%	0%
Other, please specify	0%	0%	100%	0%	0%

Volunteer Satisfaction Trends

In general, respondents who track satisfaction noted that volunteer satisfaction over the past five years has remained flat (39%) or increased (36%); with very few reporting that volunteer satisfaction has decreased (13%).

Five-Year Satisfaction Trend

Question: What trends in volunteer satisfaction have you noticed in the past five years?

N = 31

| Increasing	Decreasing	Flat	Don't know
36%	13%	39%	13%
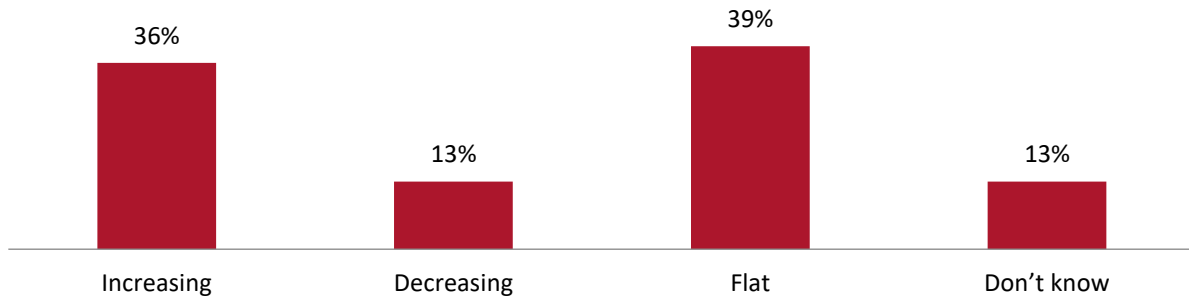
A crosstab analysis reveals that participants from Scientific/Engineering societies were less likely than participants from an association with another focus to report that volunteer satisfaction has been increasing over the past five years (17% compared to 45%). Respondents from Scientific/Engineering societies were more likely to report that satisfaction has remained flat (33%) or that they were unsure how satisfaction has changed ("Don't know" - 33%). Conversely, fewer respondents from societies with a focus other than Science/Engineering reported the same (27% noted that satisfaction is flat and 14% were unsure how it has changed in the past five years.) Similarly, respondents from organizations with a global focus were also less likely to report that volunteer satisfaction has been increasing (28% compared to 50% of organizations with a North American or national geographic scope).

Five-Year Satisfaction Trend by Geographic Scope

■ % satisfaction is increasing

Global (N = 18): 28%
North America/National (N = 14): 50%
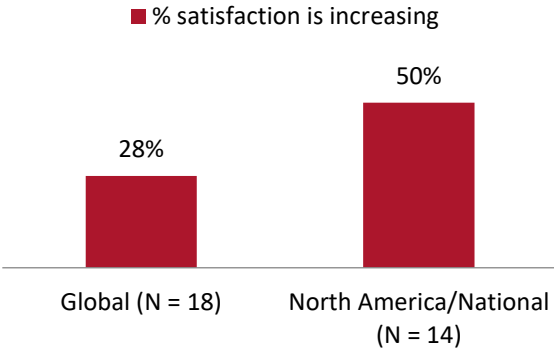
Five-Year Satisfaction Trend by Organizational Focus

■ % satisfaction is increasing

Science/Engineering (N = 6): 17%
Other focus (N = 22): 45%
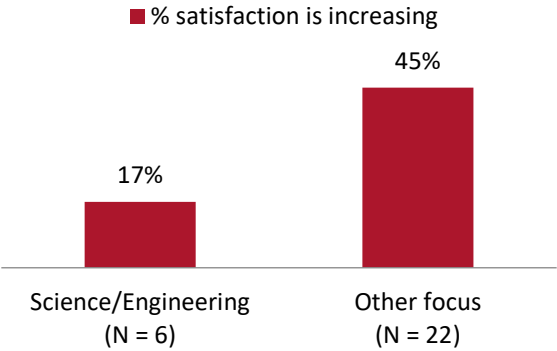
Volunteer Program Metrics

Beyond satisfaction, volunteer progression (the number of positions in which a volunteer has served) and retention (the length of time an individual has been a volunteer) emerged as key data points collected by responding organizations with 53% and 51%, respectively. The number of new volunteers was also of interest to respondents, with 45% noting that their organization collects/tracks this metric. Twenty-six percent of respondents noted that their organization does not collect any data related to their volunteer program. When volunteer satisfaction tracking is included in this metric, a total of 19% of all respondents collect neither satisfaction metrics nor other metrics related to their volunteer program.

Volunteer Program Metrics Collected

Question: Beyond satisfaction, does your association collect other data points related to your volunteer program? Please select all that apply.

N = 78

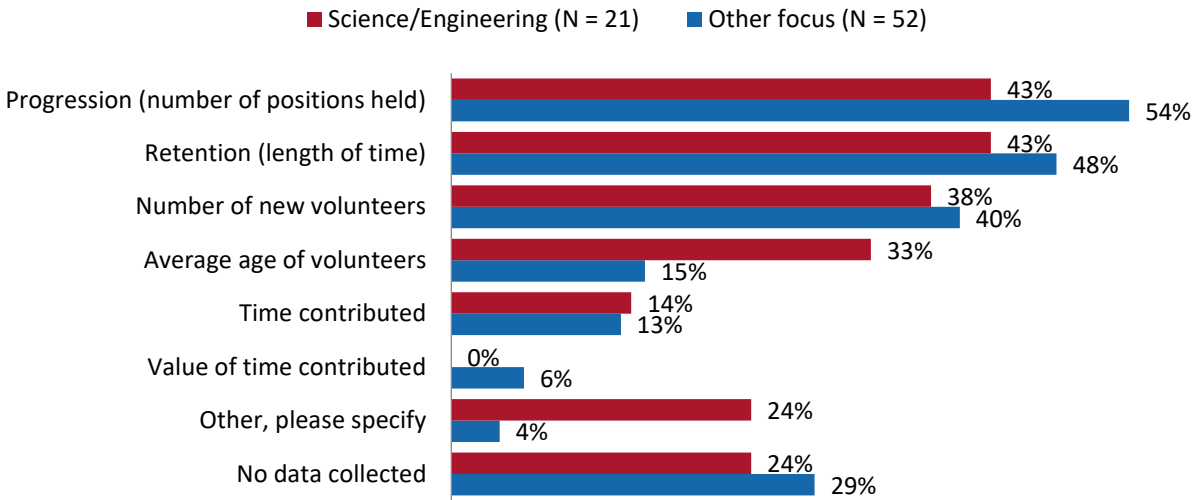| Metric	Percentage
Progression (number of positions held)	53%
Retention (length of time as a volunteer)	51%
Number of new volunteers	45%
Average age of volunteers	23%
Time contributed	14%
Value of time contributed	4%
No data collected related to volunteer program	26%
Other	10%
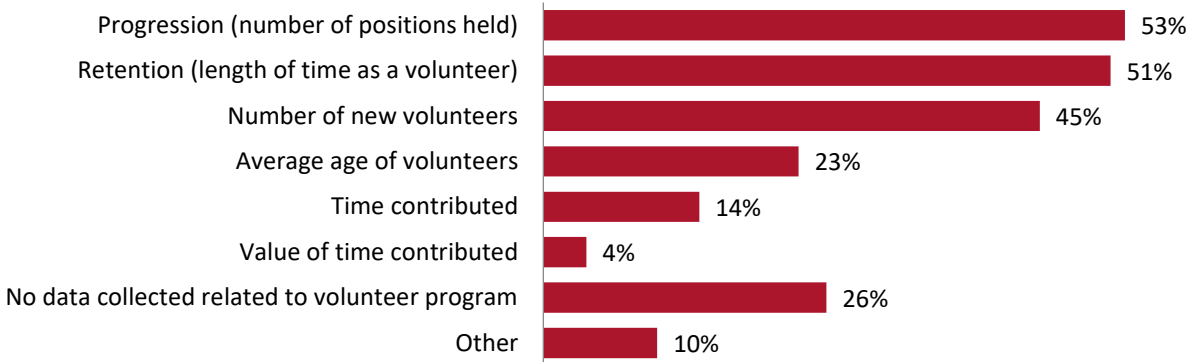
When segmented by area of focus, respondents from Scientific/Engineering societies were less likely to report that their organization collected data related to progression and retention but were more likely than participants from organizations with a focus other than Science/Engineering to collect data related to the age of volunteers (33% compared to 15%). Twenty-four percent of respondents from an organization with a Scientific/Engineering focus also provided other metrics collected by their organization. These metrics include expanded demographic information and the total number of volunteers.

Respondents from organizations with a global geographic scope were also more likely to report that their association collects data related to progression (52% compared to 41% of organizations with a North American/National scope) and retention (50% compared to 38%). Participants from associations with a North American/national scope were less likely overall to indicate that their organization collects additional data surrounding the volunteer program (35% do not collect additional data outside of satisfaction compared to 20% of global organizations).
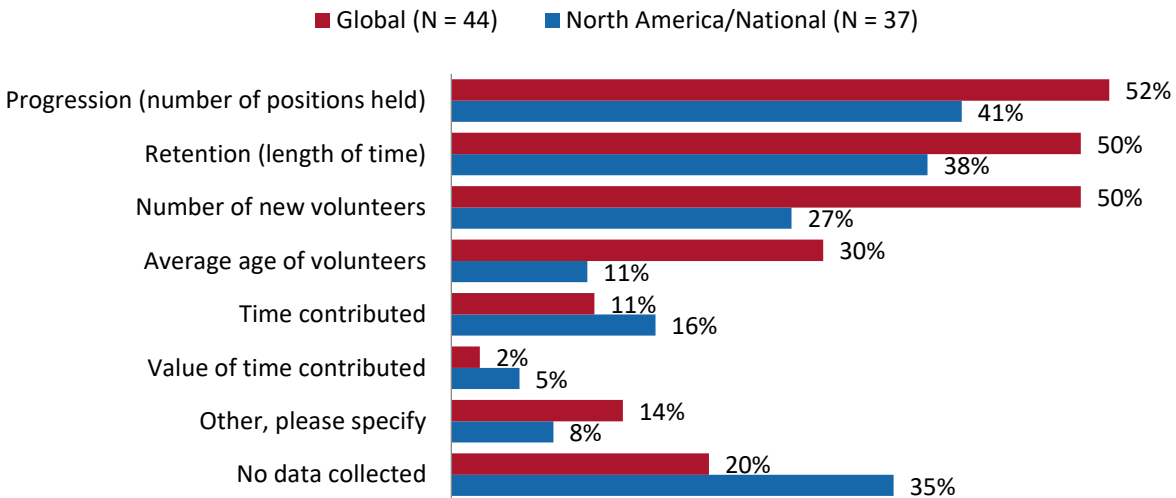
Volunteer Program Metrics by Organizational Focus

Question: Beyond satisfaction, does your association collect other data points related to your volunteer program? Please select all that apply.

■ Science/Engineering (N = 21)   ■ Other focus (N = 52)

Metric	Science/Engineering	Other focus
Progression (number of positions held)	43%	54%
Retention (length of time)	43%	48%
Number of new volunteers	38%	40%
Average age of volunteers	33%	15%
Time contributed	14%	13%
Value of time contributed	0%	6%
Other, please specify	24%	4%
No data collected	24%	29%

Volunteer Program Metrics by Geographic Scope

Question: Beyond satisfaction, does your association collect other data points related to your volunteer program? Please select all that apply.

■ Global (N = 44)   ■ North America/National (N = 37)

Metric	Global	North America/National
Progression (number of positions held)	52%	41%
Retention (length of time)	50%	38%
Number of new volunteers	50%	27%
Average age of volunteers	30%	11%
Time contributed	11%	16%
Value of time contributed	2%	5%
Other, please specify	14%	8%
No data collected	20%	35%

Respondents reported that the top two metrics (progression and retention) are primarily collected through information from the organization's central database on an annual basis. Participants also indicated that information related to progression, retention, and other volunteer program metrics are stored in their organization's Association Management System (85%) and electronic documents such as Excel or Word (57%).
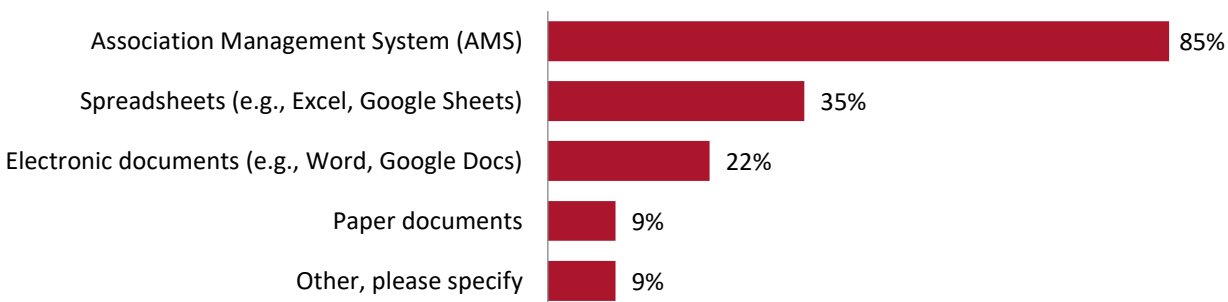
Format and Frequency of Data Collection Related to Volunteer Program

Format		Progression	Retention
Question: Please indicate the primary format with which you collect data points related to your volunteer program in the following areas.	Electronic survey	8%	11%
	Paper survey	0%	3%
	Telephone interview	0%	0%
	Informal information gathering	3%	0%
	In-person interview	0%	0%
	Information from central database	90%	87%
	Other	0%	0%

Frequency		Progression	Retention
Question: Please indicate the primary frequency with which you collect data points related to your volunteer program in the following areas.	At least monthly	3%	8%
	Quarterly	5%	0%
	Annually	72%	78%
	Every few years	3%	3%
	Ad hoc/As needed	18%	11%
	Total responses	39	38

Information Tracking Methods

Question: How do you store or track the data that your association gathers related to your volunteer program? Please select all that apply.

Association Management System (AMS)	85%
Spreadsheets (e.g., Excel, Google Sheets)	35%
Electronic documents (e.g., Word, Google Docs)	22%
Paper documents	9%
Other, please specify	9%

LEVERAGING DATA

While 74% of respondents indicated their organization collects some volunteer program metrics, many of these respondents provided comments suggesting that their organization does not share this data surrounding volunteer satisfaction and other metrics. Similarly, others noted that staff has access to data but there is no formal reporting process. For organizations that actively report on volunteer engagement and satisfaction metrics, annual reports to the Board or other governing bodies emerged as the top method of sharing the data collected.

When asked how their organization leverages the data that is collected, 31% of respondents reported that the data is relayed to nominating committees to review potential candidates for volunteer leader positions. Twenty-three percent of respondents also noted that data is mainly used to provide internal benchmarks to keep track of successes within the volunteer program (e.g., total opportunities and attendance at volunteer events). Keeping a pulse on diversity also emerged
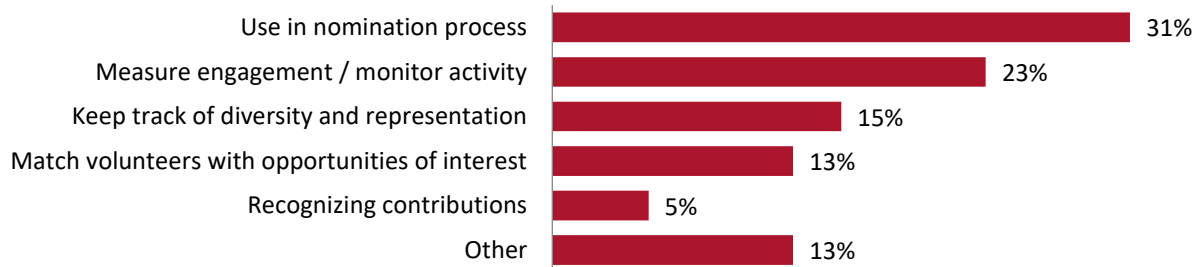
as a top way in which respondents leverage volunteer data, with 15% reporting keeping track of the demographics to ensure diverse representation in leadership.

Leveraging Data
Question: Please briefly describe how you apply and/or leverage additional data points collected on your association's volunteer program.
N = 32 (coded open-ended responses)

Use in nomination process	31%
Measure engagement / monitor activity	23%
Keep track of diversity and representation	15%
Match volunteers with opportunities of interest	13%
Recognizing contributions	5%
Other	13%

Respondents reported:

"Volunteer information is used to, among other things, inform the development of committee/task force rosters."

"We don't [use data] as much as we should! We use the data points mainly for reporting purposes and measuring progress to goals."

"We can look at reports and see what ages are not as engaged and begin to build programs around specific groups wants and needs."

VOLUNTEER TRAINING AND MANAGEMENT

When asked to describe how their organization typically trains or on-boards new volunteers, written documentation (75%) and in-person training sessions (68%) emerged as the top methods that organizations use to train or onboard new volunteers. Respondents from smaller organizations were more likely to note that their organization offers in-person training meetings/onboarding sessions (65% for organizations with $10 million or less in annual revenue and 75% for organizations with $11-25 million in annual revenue compared to 56% and 46% of organizations with revenues of $26-50 million and $51 million or more, respectively).
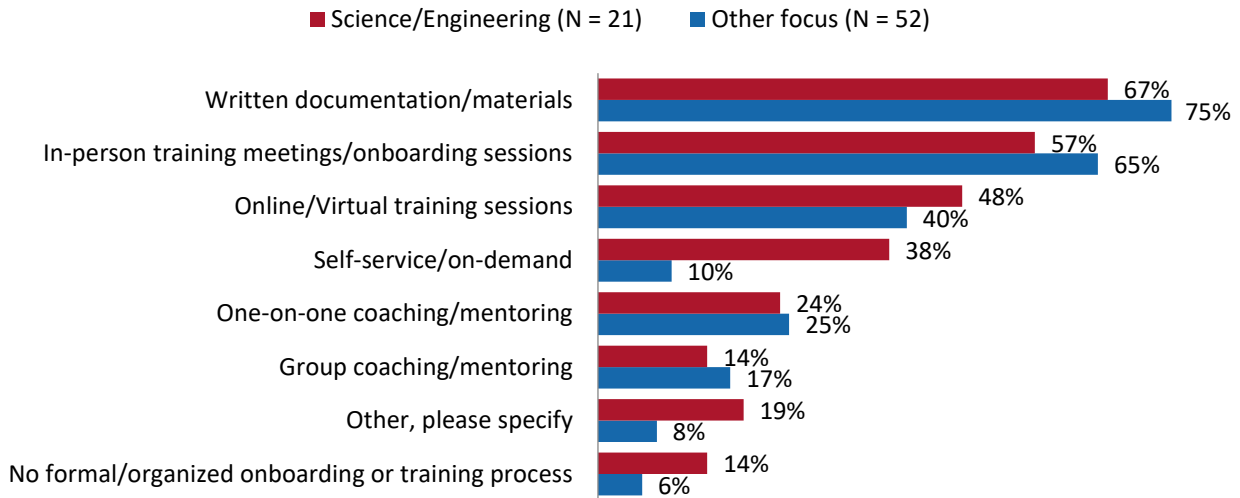
Similarly, organizations with a global scope were less likely to offer in-person training (59% compared to 68% of organizations with a North American/national focus) and were more likely to offer self-service/on-demand training (27% compared to 5%). This is most likely due to the larger geographic scope of global organizations. In total, global organizations were more likely to offer virtual options for training with 64% of respondents from global organizations offering online/virtual training sessions or self-service/on-demand training compared to 47% of organizations with a North American/national scope.

When segmented by area of focus, Scientific/Engineering societies were less likely to use these methods but were more likely to indicate that their organization trains new volunteers through online/virtual training sessions (48% compared to 40% of organizations with a non-Scientific/Engineering focus) and self-service/on-demand training (38% compared to 10%). Participants from organizations with a focus in Science/Engineering were also slightly less likely to provide any formalized training to new volunteers (14% do not provide training compared to 6% of organizations with another focus).

Volunteer Training Methods
Question: How does your association train or onboard volunteers?
Please select all that apply.
N = 72

Method	Percentage
Written documentation/materials	75%
In-person training meetings/onboarding sessions	68%
Online/Virtual training sessions	46%
One-on-one coaching/mentoring	26%
Self-service/on-demand	18%
Group coaching/mentoring	17%
No formal/organized onboarding or training process	8%
Other	11%

Volunteer Training Methods by Organizational Focus

Question: How does your association train or onboard volunteers? Please select all that apply.

■ Science/Engineering (N = 21)　　■ Other focus (N = 52)

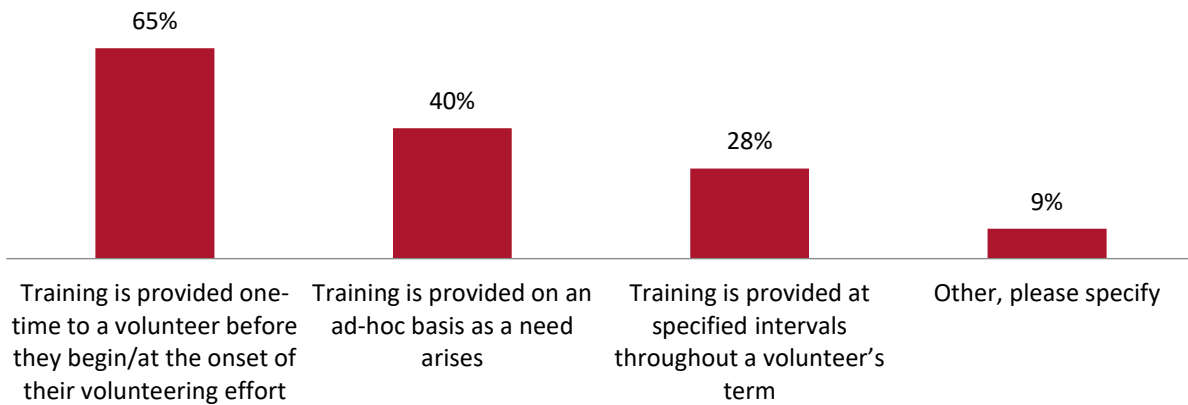| Method	Science/Engineering	Other focus
Written documentation/materials	67%	75%
In-person training meetings/onboarding sessions	57%	65%
Online/Virtual training sessions	48%	40%
Self-service/on-demand	38%	10%
One-on-one coaching/mentoring	24%	25%
Group coaching/mentoring	14%	17%
Other, please specify	19%	8%
No formal/organized onboarding or training process	14%	6%

Respondents reported that their organization typically provides training just once at the onset of a volunteer's tenure (65%), or on an ad-hoc basis as the need arises (40%). Just over a quarter of respondents (28%) reported that their organization has a formal program for volunteers with training provided at specified intervals throughout a volunteer's term. Participants from Scientific/Engineering societies were more likely to report that their organization has a more formal training process with 39% having noted that training is provided at specified intervals (compared to 21% of respondents from organizations without a Science/Engineering focus).
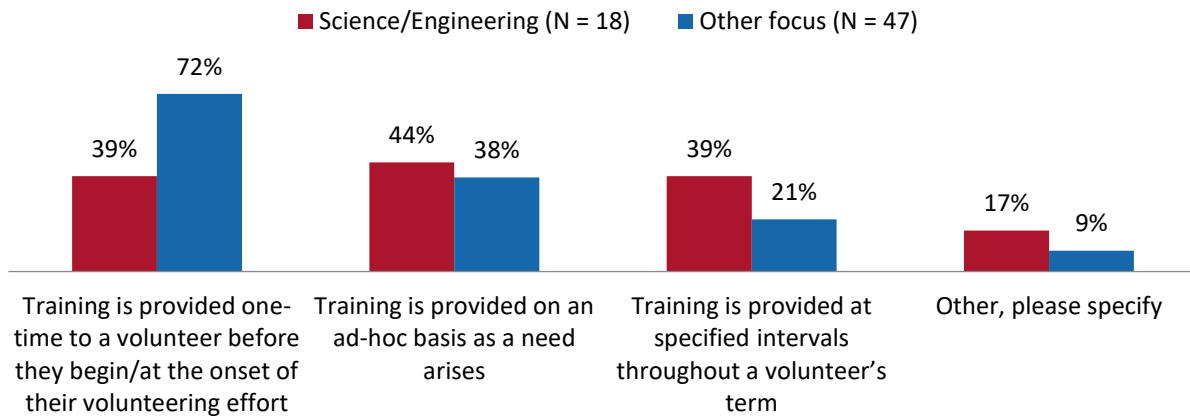
Frequency of Volunteer Training

Question: Which of the following best describes how frequently your association provides training to volunteers? Please select all that apply.

N = 65

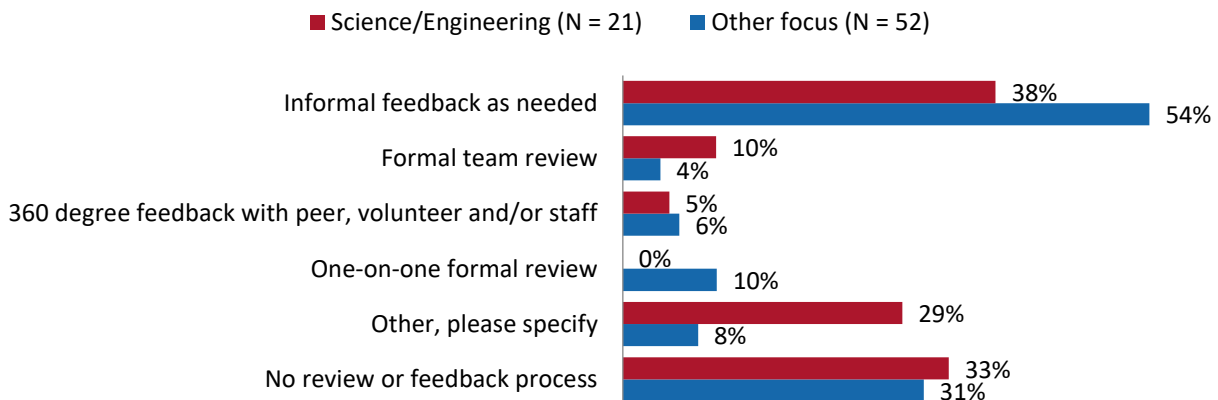| Category	Percentage
Training is provided one-time to a volunteer before they begin/at the onset of their volunteering effort	65%
Training is provided on an ad-hoc basis as a need arises	40%
Training is provided at specified intervals throughout a volunteer's term	28%
Other, please specify	9%

Frequency of Volunteer Training by Organizational Focus

Question: Which of the following best describes how frequently your association provides training to volunteers? Please select all that apply.

■ Science/Engineering (N = 18)　　■ Other focus (N = 47)

	Training is provided one-time to a volunteer before they begin/at the onset of their volunteering effort	Training is provided on an ad-hoc basis as a need arises	Training is provided at specified intervals throughout a volunteer's term	Other, please specify
Science/Engineering	39%	44%	39%	17%
Other focus	72%	38%	21%	9%

In terms of delivering feedback, 31% of respondents reported that their organization has no formal system for providing feedback to volunteers, while a slight majority (53%) noted that informal feedback is given as needed. A crosstab analysis reveals that, while slightly fewer respondents from Scientific/Engineering organizations reported that their organization has a feedback process (33% do not have one implemented compared to 31% of other organizations), the feedback process they do have in place is more formalized. In fact, over half of participants from non-Scientific/Engineering organizations (54%) reported that their association provides informal feedback on an ad-hoc basis compared to just 38% of respondents from Scientific/Engineering societies. Similarly, participants from organizations with a North American or national focus were much less likely to have a volunteer feedback process (39% compared to 27% of organizations with a global geographic scope).

Volunteer Accountability Practices by Organizational Focus

Question: How does your association manage volunteers or hold them accountable to their commitment? Please select all that apply.

■ Science/Engineering (N = 21)　　■ Other focus (N = 52)

	Science/Engineering	Other focus
Informal feedback as needed	38%	54%
Formal team review	10%	4%
360 degree feedback with peer, volunteer and/or staff	5%	6%
One-on-one formal review	0%	10%
Other, please specify	29%	8%
No review or feedback process	33%	31%

Volunteer Accountability Practices by Geographic Scope

Question: How does your association manage volunteers or hold them accountable to their commitment? Please select all that apply.

■ North America/National (N = 37)   ■ Global (N = 44)

| Category	North America/National	Global
Informal feedback as needed	62%	34%
360 degree feedback with peer, volunteer and/or staff	0%	9%
Formal team review	0%	9%
One-on-one formal review	11%	2%
Other, please specify	14%	16%
No review or feedback process	27%	39%

SUCCESSES AND CHALLENGES

When asked to describe the success of practices relating to the collection of metrics for the volunteer program, only 17% of respondents noted that their organization's current practices for tracking metrics are successful, with just 4% noting their practices as "extremely successful."

Success of Metric Tracking Practices

Question: On a scale of 1 (not at all successful) and 5 (extremely successful), how would you rate your association's practices for tracking metrics related to the success of your volunteer program?

N = 54

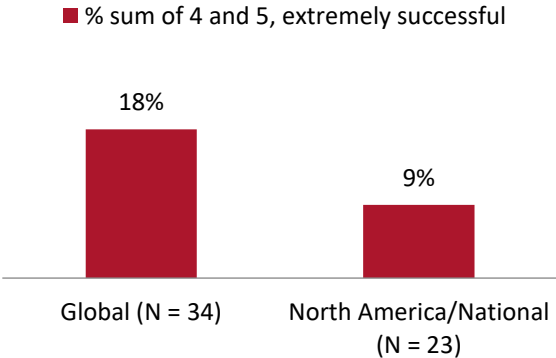| Rating	Percentage
1, not at all successful	4%
2	26%
3	54%
4	13%
5, extremely successful	4%
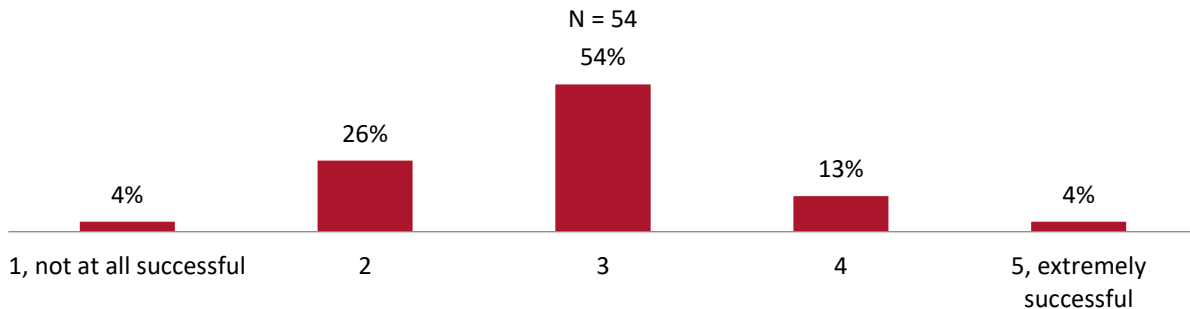
Respondents who reported that their organization is successful in tracking and measuring metrics were more likely to indicate tracking a greater number of metrics. Most notably, successful organizations (those who rated their success as a 4 or 5, extremely successful) were much more likely to track time contributed (56% compared to 13%), retention (78% compared to 50%), and progression (89% compared to 69%). Interestingly, respondents who noted that their organization is not successful in their metric tracking practices were more likely to report that their organization collected the average age of volunteers as a metric (38% compared to 33% of successful organizations). This is most likely due to these organizations focusing on demographic data at the expense of more valuable engagement data.
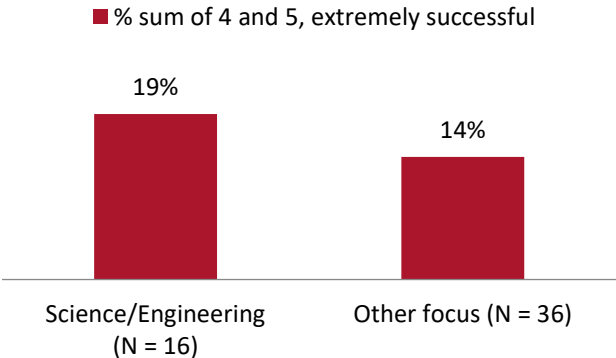
Participants from an organization with a Science/Engineering focus were more likely to note that their current practices for tracking metrics are successful (19% compared to 14% of organizations with focus other than Science/Engineering. Similarly, participants from organizations with a global geographic scope were also more likely to report success in their current practices (18% compared to 9% of organizations with a North American or national focus).

Success of Practices for Tracking Metrics by Geographic Scope

■ % sum of 4 and 5, extremely successful

Global (N = 34)	North America/National (N = 23)
18%	9%

Success of Practices for Tracking Metrics by Organizational Focus

■ % sum of 4 and 5, extremely successful

| Science/Engineering (N = 16)	Other focus (N = 36)
19%	14%

Challenges or barriers to tracking and measuring volunteer data include lack of staff time or resources (27%), lack of interest either from decision makers within the organization or the volunteers themselves (17%), limitations of AMS or other databases (16%), and consistency in how metrics are tracked/stored (15%).

Challenges to Tracking Data

Question: What challenges or barriers exist to tracking or measuring data related to your association's volunteer program?

N = 61, responses coded from open-end question
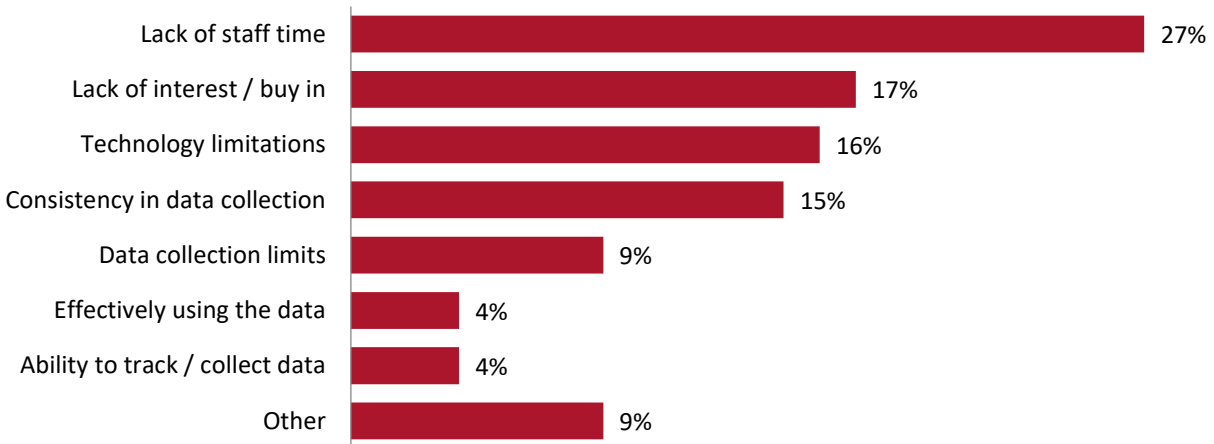
When asked to describe these challenges, respondents reported:

> *"Currently, it is only semi-automated - through the association management system. There is a lot of manual work associated with monitoring."*

> *"Engaging volunteers in completion of online data [profiles] and time to manage a hefty cumbersome process."*

> *"Resources! We have a very stretched staff already. We simply do not have time to track and analyze a lot of data."*

Other challenges in engaging and meeting the needs of volunteers include:

- **Increasing member awareness** – Respondents noted that there is a general lack of awareness of the volunteer opportunities available and find difficulty in informing members of ways to get involved with the organization.
- **Creating meaningful volunteering opportunities** – Many participants noted that their organization has a high number of members interested in volunteering, but too few positions to satisfy the need. Micro-volunteering (short-term opportunities) emerged as a potential solution to this challenge.
- **Competing for volunteers' time** – Especially at the higher engagement levels, lack of time on the part of the volunteer was mentioned as a significant challenge to mitigate. In addition to their career, members may also be serving in a volunteer capacity with other organizations - contributing to a reduction in the amount of time a volunteer can lend to their role.

- **Growing the volunteer base** – Respondents noted that there can be a tendency to "recycle" volunteers within their organization instead of ensuring that new members are able to filter into the role. Especially with respect to volunteer diversity, respondents reported that it can be difficult to ensure diverse representation of their membership in volunteer roles.

When asked to describe the policies or practices that have been effective in recruiting, engaging, and retaining volunteers, the following successful tactics were referenced:

- **Leveraging volunteer referrals and direct outreach** – Respondents affirmed that their volunteer program benefits from word of mouth recruitment. Other direct outreach tactics include formal programs to match a volunteer with an opportunity of interest, or personal outreach by a staff member or established volunteer.
- **Setting clear expectations** – Defined descriptions of volunteer positions and the expectations for serving, in addition to formal orientations, emerged as effective engagement tactics.
- **Establishing specialized volunteer programs** – Respondents that have developed leadership academies and formalized volunteer profile programs designed to interest and identify new volunteers spoke positively about the impact of these tailored approaches.

Appendix

ORGANIZATIONAL CHARACTERISTICS

Organization Size
Question: What is the budget range of your association?
N = 75

15%	20%	27%	21%	17%
$5 million or less	$6-10 million	$11-25 million	$26-50 million	$51 million or more

Geographic Scope
Question: What is the geographic scope of your association? Please select all that apply.
N = 77

57%	21%	34%	3%	6%	4%
Global	North America	United States/National	Regional	State	Local