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## From Territorial to Transformational: A New Framework for Master Volunteer Engagement

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## **From Territorial to Transformational: A New Framework for Master Volunteer Engagement**

### **Abstract**

Meaningful volunteer engagement depends on the Extension professional's volunteer management philosophy, training, and organizational support for using volunteers. Volunteer development and leadership development are typically absent from management-focused volunteer models used in Extension. Professional development of the Extension professional, beyond discrete management tasks, is lacking but is needed for authentic volunteer engagement through master volunteer programs. A volunteer engagement framework is described to guide a shift from volunteer management to engagement, including use of principles of the community-based participatory approach. The volunteer engagement framework can help professionals identify and self-assess the skill set needed for authentic and sustained volunteer involvement in support of Extension.

**Keywords:** [volunteer management](#), [volunteer development](#), [master volunteers](#), [health volunteers](#), [volunteer engagement](#)

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Volunteers are as fundamental to Extension work as our reliance on research-based information. Volunteers have been critical in Extension's delivery strategy since inception, but engagement levels vary greatly, primarily dependent on factors external to volunteers, such as the Extension professional's volunteer management philosophy, training, and organizational support (Boyd, 2004; Strauss & Rager, 2017). Just as Extension programming evolves to meet local needs, volunteer management strategies must change to address shifting priorities and renewed focus on community-based approaches, particularly for health outreach (Washburn, 2017). After reviewing volunteer management models commonly used in Extension work, we present a new volunteer engagement framework (VEF) we developed to guide Extension personnel as they involve volunteers as equal partners. This framework is especially relevant as master volunteers are developed to extend reach in health and wellness efforts. Extension professionals can use this framework to assess their own readiness for expanded volunteer engagement.

## Background and Rationale

Introduced nearly 40 years ago, ISOTURE (Identification, Selection, Orientation, Training, Utilization, Recognition, Evaluation) provided the foundation for volunteer management professionals and is the model from which later Extension-focused volunteer management models evolved (Boyce, 1971; Safrit & Schmiesing, 2011). Boyce (1971) asserted that volunteer management involves leadership development and was the first to focus on growth and development of the volunteer leader as an aspect of the volunteer manager's role. Volunteer leadership development is less explicit in other volunteer management models, such as GEMS (Generate, Educate, Mobilize, and Sustain) and LOOP (Locating, Orienting, Operating, Perpetuating) (Culp, 2012; Penrod, 1991). These draw from the human resources management (HRM) model of volunteer management used by nonprofits to shape best practices. HRM focuses on core job functions performed by volunteers, lacking emphasis on volunteer development (Einolf, 2018). Although components of these models make practical sense, they fail to acknowledge the critical relational nature of volunteer management and the importance of the volunteer manager's role in optimizing volunteer development.

A further deficiency of existing models is absence of attention to professional development, specifically with regard to the attitudes and leadership behaviors of the local volunteer manager (Extension agent). Of 10 volunteer management models reviewed by Safrit and Schmiesing (2011), only three explicitly included professionalism and development of the volunteer manager as key components. Boyd (2004) highlighted Extension professionals' deficiencies in coordinating volunteers and concerns about insufficient training. Given the absence of models emphasizing the important role of volunteer managers, and continued reliance on HRM approaches to volunteer management in Extension, new tools are needed to guide Extension professionals in working with volunteers. Addressing this need is particularly important as the Extension system considers engaging master volunteers to improve health for individuals and communities, a relatively new area for using master volunteers.

Management of all volunteers, especially master volunteers, requires delicately balancing the bureaucracy inherent in the land-grant system and the need for local autonomy (Einolf, 2018). Master volunteers can extend Extension reach by serving as a paraprofessional-type community workforce if applicable opportunities are provided (Strauss & Rager, 2017). However, existing volunteer management models are just that—management of volunteer efforts, often oversimplified in checklist form, overlooking the impact of the supervising Extension professional's attitudes and leadership behaviors on the volunteer development process. Objective management measures fail to acknowledge the unique nature of Cooperative Extension's work in communities, with clientele and volunteers, where "management" may stand in the way of "engagement."

Existing management models also lack a community-based participatory approach (CBPA) critical for sustained success of volunteer efforts to improve health (Israel, Eng, Schulz, & Parker, 2013). CBPA principles applied to volunteer leadership include engaging volunteers as equal partners, sharing decision making, valuing authentic engagement, and balancing the organization's needs with volunteers' interests and developmental needs. Application of such principles contrasts with current volunteer management practices of predetermining volunteer roles before volunteers are recruited and creating generic position descriptions based on organizational needs without involving volunteers in role cocreation.

## VEF

Implementing Extension master volunteer programs for community health calls for new levels of volunteer engagement. The national movement toward adoption of such programs suggests that new tools are needed to guide Extension professionals in their work with these groups. We developed the VEF to address this need, and it can be used by Extension professionals to self-evaluate where they fall on a volunteer engagement continuum and identify behaviors needed to progress. Informed by CBPA, community engagement principles, and applied experiences with master volunteer programs, the VEF is rooted in transformative education and transformational leadership theories (Bass & Riggio, 2006; Boyd & Myers, 1988; Israel et al., 2013; McCloskey et al., 2011). The tool was reviewed by a panel of state and county Extension professionals in two states and refined according to their feedback.

The VEF presents a continuum of volunteer engagement described in four levels: territorial (Figure 1), targeted (Figure 2), transitional (Figure 3), and transformational (Figure 4). Each level includes educator and volunteer perceptions ("Think") and actions ("Do"), along with implications related to return on investment, time commitment, program scope, and probable social ecological model level addressed.

**Figure 1.**  
Volunteer Engagement Framework Level 1: Territorial

LEVEL 1: TERRITORIAL		
	THINK	DO
E D U C A T O R	<ul style="list-style-type: none"> <li>Does not see role for volunteers in program</li> <li>Questions the value of volunteer involvement</li> <li>Believes menial or mundane tasks are appropriate for volunteers</li> <li>Views participants as passive recipients of program content</li> <li>Worries volunteers will supplant educator role</li> <li>Believes volunteers are inadequate to act independently</li> <li>Does not want to burden or overwhelm volunteers by involving them to greater extent</li> </ul>	<ul style="list-style-type: none"> <li>Identifies tasks for volunteers</li> <li>Provides limited training</li> <li>Recruits from a convenient, known audience</li> <li>Remains present as "expert up front" or "sage on the stage"</li> <li>Keeps a tight management structure</li> <li>Personally supervises volunteer efforts</li> <li>Does not use volunteers to full potential</li> </ul>
V O L U N T E E R	<ul style="list-style-type: none"> <li>Internalizes educator thoughts on volunteer involvement, role, and scope</li> <li>Questions educator's and agency's commitment to involving volunteer in education and outreach</li> <li>Understands organization or agency scope based on knowledge of educator's programs</li> </ul>	<ul style="list-style-type: none"> <li>Assists the educator in secondary role, if at all</li> <li>Is not involved in meaningful dialogue regarding program leadership/direction</li> <li>Reports directly to educator</li> </ul>
		<p><u>Return on Investment</u> Negative</p> <p><u>Educator Time Commitment</u> Very High</p> <p><u>Volunteer Program Scope</u> Very Limited; Growth dependent on educator time and interests</p> <p><u>Social Ecological Model Level Addressed</u> Likely Individual only</p>

**Figure 2.**  
Volunteer Engagement Framework Level 2: Targeted

LEVEL 2: TARGETED		
THINK	DO	IMPLICATIONS
<ul style="list-style-type: none"> <li>Focuses on finding the “right” people to recruit as volunteers</li> </ul>		
<ul style="list-style-type: none"> <li>Believes volunteers work “for” the educator and support his or her program</li> </ul>	<ul style="list-style-type: none"> <li>Provides volunteer training with limited input from volunteers</li> </ul>	<u>Return on Investment</u> Slightly Negative
<ul style="list-style-type: none"> <li>Views volunteers as program participants, not equal partners</li> </ul>	<ul style="list-style-type: none"> <li>Recruits through personal network</li> </ul>	
<ul style="list-style-type: none"> <li>Focuses on complying with agency requirements</li> </ul>	<ul style="list-style-type: none"> <li>Identifies tasks for volunteers, often administrative or maintenance</li> </ul>	<u>Educator Time Commitment</u> High
<ul style="list-style-type: none"> <li>Views volunteers as a liability, burden, or management challenge</li> </ul>	<ul style="list-style-type: none"> <li>Has final say on projects planned by volunteers</li> </ul>	
<ul style="list-style-type: none"> <li>Feels uncomfortable with volunteers independently delivering programs or leading projects</li> </ul>	<ul style="list-style-type: none"> <li>Asks for feedback but has the final say on all aspects of the program</li> </ul>	<u>Volunteer Program Scope</u> Limited; Scope dependent on educator time and interests
<ul style="list-style-type: none"> <li>Sees a few people doing most of the work</li> </ul>		
<ul style="list-style-type: none"> <li>Internalizes educator thoughts on volunteer involvement, role, and scope</li> </ul>	<ul style="list-style-type: none"> <li>Serves in one role or program (e.g., nutrition, exercise)</li> </ul>	<u>Social Ecological Model</u> <u>Level Addressed</u> Individual and/or Interpersonal
<ul style="list-style-type: none"> <li>Seeks affirmation from the educator</li> </ul>	<ul style="list-style-type: none"> <li>Is not used to full potential</li> </ul>	
<ul style="list-style-type: none"> <li>Views organization or agency through a narrow, program-specific lens</li> </ul>	<ul style="list-style-type: none"> <li>Teaches what educator taught him or her – an extension of the educator</li> </ul>	
	<ul style="list-style-type: none"> <li>May co-teach with educator or independently with limited scope of responsibility</li> </ul>	

**Figure 3.**  
Volunteer Engagement Framework Level 3: Transitional

LEVEL 3: TRANSITIONAL		
THINK	DO	IMPLICATIONS
<ul style="list-style-type: none"> <li>Values the experience and knowledge volunteers possess</li> </ul>	<ul style="list-style-type: none"> <li>Engages volunteers in determining training content</li> </ul>	
<ul style="list-style-type: none"> <li>Views volunteers as helpful resources to accomplish the agency mission</li> </ul>	<ul style="list-style-type: none"> <li>Engages volunteer recruits in planning their volunteer activities</li> </ul>	<u>Return on Investment</u> Neutral or Slightly Positive
<ul style="list-style-type: none"> <li>Has vested interest in maintaining volunteer involvement</li> </ul>	<ul style="list-style-type: none"> <li>Determines roles after learning volunteers’ interests, strengths, and needs</li> </ul>	
<ul style="list-style-type: none"> <li>Looks for and recognizes volunteers’ special expertise or interest in a topic</li> </ul>	<ul style="list-style-type: none"> <li>Recruits volunteers with specific expertise to enhance programming</li> </ul>	<u>Educator Time Commitment</u> Moderate
<ul style="list-style-type: none"> <li>Is comfortable sharing power and decision making</li> </ul>	<ul style="list-style-type: none"> <li>Largely determines which roles volunteers play by asking for their involvement in specific ways</li> </ul>	
<ul style="list-style-type: none"> <li>Trusts volunteers</li> </ul>	<ul style="list-style-type: none"> <li>Engages volunteers to make decisions about important aspects of the program</li> </ul>	<u>Volunteer Program Scope</u> Expanded; Programs increased through volunteer involvement
<ul style="list-style-type: none"> <li>Is intentional in developing or strengthening relationships</li> </ul>		
<ul style="list-style-type: none"> <li>Reaches more people and diverse audiences</li> </ul>	<ul style="list-style-type: none"> <li>Is responsible for programs, events, and outreach activities</li> </ul>	<u>Social Ecological Model</u> <u>Level Addressed</u> Individual, Interpersonal, and/or Community levels
<ul style="list-style-type: none"> <li>Has a sense of program ownership</li> </ul>	<ul style="list-style-type: none"> <li>Leads programs the educator is not interested or talented in OR identifies work with guidance of the educator</li> </ul>	
<ul style="list-style-type: none"> <li>Feels a sense of pride from being involved</li> </ul>	<ul style="list-style-type: none"> <li>Shares in some decisions about program aspects</li> </ul>	
<ul style="list-style-type: none"> <li>Feels a sense of belonging as a valued member of a group</li> </ul>	<ul style="list-style-type: none"> <li>Independently leads or teaches programs</li> </ul>	
<ul style="list-style-type: none"> <li>Views organization or agency as part of larger system</li> </ul>	<ul style="list-style-type: none"> <li>Recruits others to sustain program</li> </ul>	

**Figure 4.**  
Volunteer Engagement Framework Level 4: Transformational

LEVEL 4: TRANSFORMATIONAL		
THINK	DO	IMPLICATIONS
<div>E D U C A T O R</div> <ul style="list-style-type: none"><li>• Values diversity of thought and background in recruiting and supporting volunteers</li><li>• Values volunteers as partners, co-creators, co-learners, and co-educators</li><li>• Is intentional in pursuing a collaborative leadership approach</li><li>• Feels a sense of camaraderie with volunteers</li><li>• Sees volunteer engagement as an essential outreach strategy</li><li>• Feels commitment of volunteers validates Extension's role in communities</li></ul>	<ul style="list-style-type: none"><li>• Engages volunteers in work that draws on their unique skills and interests</li><li>• Creates opportunities for volunteers to expand their skill sets</li><li>• Trusts and empowers semiautonomous volunteers</li><li>• Is transparent and openly shares information</li><li>• Shares decision making</li><li>• Seeks volunteers' ideas and contributions</li><li>• Challenges volunteers to think critically and question</li><li>• Develops leadership skills in others</li><li>• Fosters a culture of inclusion and equity within volunteer group</li></ul>	<div><u>Return on Investment</u> Positive</div> <div><u>Educator Time Commitment</u> Minimal</div> <div><u>Volunteer Program Scope</u> Enhanced; Programs enriched through volunteer engagement</div>
<div>V O L U N T E E R</div> <ul style="list-style-type: none"><li>• Shares mission, vision, and purpose</li><li>• Feels valued and trusted by educator and agency</li><li>• Sees benefit in engaging with the community to influence change</li><li>• Feels empowered to act independently</li><li>• Understands role parameters</li></ul>	<ul style="list-style-type: none"><li>• Contributes to a shared mission and vision</li><li>• Is engaged in work driven by his or her own interests and skills</li><li>• Operates as semiautonomous to leverage outreach and education</li><li>• Pursues projects and activities matched to community needs and personal interests</li><li>• Provides community-level leadership</li><li>• Actively recruits others to join program</li></ul>	<div><u>Social Ecological Model Level Addressed</u> May address all levels; meaningful community-level engagement</div>

## Implications and Conclusion

Opportunities abound for volunteer involvement in Extension (Boyd, 2004). Meaningful master volunteer engagement begins with readiness of Extension professionals to work with master volunteers in shared planning and implementation of programming. The VEF provides opportunity for Extension professionals to self-evaluate attitudes and attributes contributing to shared leadership with master volunteers. Although not meant to address the broad gap in the literature between volunteer administration and volunteer engagement, the VEF begins movement toward identification and application of a skill set required for effective, efficient, and long-lasting master volunteer involvement.

For Cooperative Extension to remain relevant and compete in an era where information is always available at one's fingertips, it has to be present where people live and work. This imperative is hard to reconcile with Extension's shrinking resources and community footprints. Effectively mobilizing and using master volunteers can leverage Extension outreach and education, allow Extension to reach new audiences, and allow Extension professionals to focus on higher priority issues and strategic visioning. The intent of the VEF is to change the question from "what do I do with my volunteers?" to "what can my volunteers do?"

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