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Symphony Orchestra Volunteers: Vital Resources

by

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Symphony Orchestra Volunteers: Vital Resources

Volunteers. No symphony orchestra organization can function without them. But are they necessary evils or vital resources? Decidedly the latter in the mind of Mike Gehret, Vice President for Marketing and Development for the Chicago Symphony Orchestra.

Gehret has been involved in nonprofit management for more than 25 years, including service with three large-budget orchestras. In his essay, he shares practical and proven ideas for making optimal use of volunteer resources.

Philosophy First

The essay begins with a recitation of the philosophical underpinnings of Gehret's thinking about volunteers and how to involve them successfully in institutional marketing. He then explains that while there is a temptation to think that involving large numbers of volunteers will free staff members' time, just the opposite is often true. He argues that there are few shortcuts available to staff if volunteers' time is to be used wisely. He also explains why it is important that every volunteer have a "point of contact" to turn to for answers, advice, and help on projects.

Finding, Training, and Keeping Volunteers

Much of the essay is devoted to detailed descriptions of the actions required to find, train, and keep volunteers. Gehret suggests that when the process works, it is circular—volunteers who truly understand institutional marketing and produce successful programs attract favorable publicity, which in turn fuels successful fund-raising campaigns, thereby attracting more capable volunteers, and leading to even more successful programs.

Setting Expectations

The theme of the essay then turns to expectations. Gehret explains that both volunteers and staff need guidance as they perform tasks to support the orchestra. He also reminds readers that using volunteers wisely includes making time for just plain fun. Returning to the philosophical tone with which it began, the essay concludes with a series of questions for future consideration.

The careful review of using volunteer resources wisely which this essay presents should provide food for thought for orchestral volunteers at all levels, staff, and musicians alike.

Symphony Orchestra Volunteers: Vital Resources

The roles of volunteers in nonprofit organizations and, more specifically, in the development process are the subject of volumes of writing. Furthermore, symphony orchestra volunteers receive extensive attention, particularly from the American Symphony Orchestra League (ASOL) in *Symphony* magazine and in the work of the National Task Force for the American Orchestra as reported in “Americanizing the American Orchestra.” Each year, workshops, presentations, and panels at meetings of the ASOL and state orchestra associations are devoted to the recruitment, organization, and utilization of volunteers in the orchestra field.

This focus on volunteers reflects both the important roles which volunteers play in the governance and operation of symphony orchestras and the frequent frustration which volunteers and staff alike feel when volunteer resources are not well used or when they are inadequate to the task. While most of us involved with symphony orchestras understand the musical resources needed to mount a performance of Beethoven’s *Symphony No. 9* or Mahler’s *Symphony of a Thousand*, the human resources—both volunteer and staff—necessary for the development function to be successful are less well understood. In fact, I would guess that the human-resource needs of the development program remain a mystery to all but a small group of executive directors, senior development staff, and trustee leadership. These needs are most certainly a mystery to many orchestra players whose activities are so dependent on the adequacy of such resources.

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The editors of *Harmony* asked this author to take a fresh look at the employment of volunteers in the institutional marketing of symphony orchestras and at attitudes and approaches needed to obtain and maintain those resources. My views on the subject are formed by more than 25 years of nonprofit management experience, including nearly 20 years in institutional marketing for three large-

budget orchestras. The following set of assumptions underpin these views:

- ◆ Symphony orchestras function best when they are truly volunteer-centered and when ownership of the organization rests with the board of trustees on behalf of the local community. The board alone can hire and fire the music director and the executive director; thus the board members have, and must accept, direct responsibility for the quality of the artistic product and for the quality of the management. Board members and other volunteers are at the center of policy-making and goal-setting processes. When volunteers are involved in this way, policies and goals become those of the whole organization, not just the staff. I know of no exceptions to this assumption.
- ◆ Development is not just fund raising and marketing is not just selling tickets. The Chicago Symphony Orchestra (CSO) has a Department of Marketing and Development, which might just as easily be called the “Department of Institutional Marketing.” Volunteers and staff engaged in the CSO’s institutional marketing program work to help create a positive climate around the institution so that it can raise money, sell tickets, and successfully achieve the artistic goals of the orchestra.
- ◆ On every level, successful institutional marketing involves building relationships. The more personal those relationships, the easier it is to create a favorable climate around the orchestra. The large numbers of potential ticket buyers and contributors who must *each* be reached and the unique positions that volunteers, as distinct from staff, have in the community, dictate the important role which volunteers must play in the relationship-building process.
- ◆ Orchestra volunteers, by definition, are not compensated financially. They choose to volunteer for a variety of reasons and it is important for management to understand what motivates each volunteer. The competition for volunteers’ time and dollars is increasing; volunteers are choosing more carefully the organizations for which they will work, and the work they will do. Volunteers want to be involved—and should be involved—in making key decisions and they insist on staff support of high quality.
- ◆ There are no “tricks” to suggest in successfully involving volunteers in institutional marketing; there are few truly “new” ideas in working with orchestra volunteers. Rather, volunteer programs are successful

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because they follow a well-designed plan which relies on volunteers and staff who are devoted to the orchestra, work hard, communicate openly with each other, and pay attention to detail.

Volunteers are commonly involved with orchestras in governance activities; in direct service activities, including fund raising, ticket sales, and event production; and as advisors to the orchestra leadership in areas of special expertise, such as management consulting, and on legal and accounting issues.

“On every level, successful institutional marketing involves building relationships.”

The first challenge orchestras face is defining the roles which volunteers will play in each of these areas, and then determining what sorts of volunteer resources are needed to fill those roles. Several conditions must be met before this can be done. First, staff must be clear about their own roles before they can help define volunteer roles. Second, there must be important tasks for volunteers to do and they should be tasks at which particular volunteers have some likelihood of success. And third, there must be an institutional commitment to providing adequate resources to staff the orchestra’s volunteers.

The Need for Staff Support

While it is tempting to assume that involving large numbers of volunteers will free up staff time, in reality, large volunteer forces require a great deal of staff support. In fact, there is often a tendency to *underestimate* the staff resources necessary to provide adequate support for a large, active, and involved group of volunteers. Involving volunteers, particularly new volunteers, in the life of the orchestra is a labor-intensive activity and there are few shortcuts.

Determining appropriate staffing levels is one of the more interesting challenges that development professionals face, particularly because it is usually difficult to determine the economic contribution of a particular staff member. I also question how useful it is to apply general formulas to specific institutions. Can one generalize to the extent of saying that Orchestra X should spend 5 percent of its total budget on development; or that Orchestra Y needs 1 staff member for each 100 volunteers? Probably not.

But what is clear, at least here in Chicago, is that the economic rewards of a strong volunteer program are considerable. Data currently being gathered for a new CSO long-range planning process have helped us to look beyond the dollars raised by volunteer solicitors and through special-event fund raising. Preliminary figures show that 1,425 volunteers have contributed twice as much cumulatively over their lifetimes as 13,360 subscribers who are not volunteers. Even more impressively, the average amount donated over a lifetime by each volunteer is nearly 18 times larger than the amount donated by nonvolunteers.

The Importance of a “Point of Contact”

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When we look at those volunteers whom we have been successful in involving, we find that each has at least one, and probably several, strong points of contact within the organization. A “point of contact” is the person to whom the volunteer knows he or she can turn for answers, for advice, for help on a project, or for other kinds of assistance. While that person is sometimes a volunteer, it is more often a member of the staff. If staff resources are inadequate to provide sufficient points of contact for each volunteer, the result may be a shrinking volunteer pool or a group of volunteers with many inactive members.

In the volunteer-centered orchestra, the institutional marketing staff maintains a collaborative and supportive relationship with volunteer leaders. Staff members work with volunteer leadership to set priorities that are consistent with larger institutional goals and that recognize that not all challenges and opportunities are equally important. They help

volunteer leadership to manage the larger body of volunteers and they help energize volunteers when enthusiasm and motivation begin to lag, as inevitably happens from time to time. They also furnish technical knowledge, supply clerical and other support services, furnish information, and keep records. Finally, the staff fills these functions while placing the institution’s volunteers at the center of activity—and in the spotlight—while not seeking attention for themselves.

Decisions regarding the employment of volunteer resources ought to be corporate decisions; they should be made jointly by staff and volunteer leadership, not by one group or the other acting alone. Written job descriptions can be helpful when there are questions about particular volunteer and staff roles.

However, in orchestras where volunteers and staff work successfully as a team, such questions do not often arise, nor do such questions as, “Which volunteer or which staff person has the final authority to make this decision?” Similarly, “crediting” issues (deciding which staff or volunteers get the credit for bringing about a particularly positive event or for meeting a particular goal) occur less frequently in orchestras in which volunteers and staff work as teams. In most successful orchestras, there is enough good news for everyone to share in the credit.

Finding Volunteers

Where do symphony orchestras find their volunteers? First and foremost, they find them among the ranks of concert goers. Volunteers are motivated by a variety of factors including sheer altruism, a need to socialize and be with other

people, developing professional contacts, social panache, and getting specific kinds of experience or training. Orchestra volunteers usually become involved because they are devoted to symphonic music and have strong emotional ties to the local orchestra. A majority of orchestra volunteers have had some formal musical training.

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Enlisting a new volunteer is not at all unlike asking someone to make a contribution. Like most successful fund-raising calls, effective volunteer recruiting evolves from an existing or a newly established personal relationship. There is an adage among development professionals: large gifts result from the right person asking the right prospect for the right amount at the right time. Similarly, volunteers are more likely to enlist when asked to do so by the right person at the right time for the right reasons and in the right way.

Whether the orchestra is searching for potential trustees, solicitors for a capital campaign, or volunteer docents for an educational program, the first question

asked should be, “Who attends our concerts?” This line of thinking leads to recruiting new volunteers through ads in the program book, special events focused on music and musicians, and mailings to subscribers and frequent single-ticket buyers. It points to the importance of referrals, both from members of the orchestra “family” (those who already volunteer, as well as staff and musicians), and self-referrals. In the case of potential trustees and other volunteer leaders, this thinking suggests a preference for involving those for whom music and the particular orchestra are an important focus of their lives, rather than those for whom service is a community responsibility or the means to make particular social and business contacts.

In this respect, the process of identifying and recruiting orchestra volunteers is circular. Volunteers become intimately involved with all aspects of institutional marketing. Successful institutional marketing programs generate great amounts of favorable publicity about the orchestra, sell more tickets, and fuel stronger and more successful fund-raising campaigns. Favorable results help to attract greater numbers of the most capable volunteers, leading to ever more successful programs.

Kent Dove, in his book *Conducting a Successful Capital Campaign*, suggests some factors in the successful recruitment of key volunteers, which are paraphrased below. These factors are as applicable to governance volunteers, advisory volunteers, and other direct service volunteers as they are to capital-campaign volunteers. They include:

- ◆ Involving appropriate volunteers and staff in asking someone to volunteer. Peer-to-peer volunteer recruitment is just as effective and necessary as peer-to-peer solicitation.

- ◆ Meeting personally with the prospective volunteer at a time and place that can allow for an unhurried discussion.
- ◆ Beginning with the case statement for your orchestra and for the particular program for which you are asking the person to volunteer. People respond to opportunities and to vision.
- ◆ Describing the job being offered clearly. Written job descriptions are often a good idea, especially to the degree that they force the institution to think about its volunteer staffing needs and organization. Additionally, it is useful to describe how the prospective volunteer is uniquely suited to fill this position.
- ◆ Outlining staff and other resources that will be provided to assist the prospective volunteer in doing her or his job.
- ◆ Assuring the prospective volunteer of support from other key volunteer and staff leadership.
- ◆ Estimating the amount of time needed to do the job. The best volunteers are often the busiest; they devote large amounts of time to things that are important to them. If you try to downplay the time and energy necessary to do the job, the prospective volunteer might turn it down as not being demanding and important enough to be worthy of her or his time.
- ◆ Explaining how the volunteer will be involved in setting goals. If goals for the program have already been set, help the prospective volunteer understand how the goals were set, and that they are attainable.
- ◆ Answering questions fully and honestly.

Training and Educating Volunteers

Once volunteers are enlisted, training and educating them become the keys to their successful involvement in the orchestra. The written materials provided for volunteers and such activities as volunteer orientations require thought and attention. However, the most important factor in training and educating volunteers involves inculcating them with the culture of the institution. This activity is so critical that it cannot be left to a volunteer handbook or single orientation event.

The institution's culture can be passed along to new volunteer in many ways. For instance, many nonprofit organizations have experimented successfully with volunteer mentors. New volunteers, whether trustees or direct service volunteers, are assigned a volunteer "mentor" who is intimately familiar with the organization. The mentor takes responsibility for making sure that the new volunteer understands how the institution functions and introduces her or him to other volunteers and staff. Mentors play an active role for the first three to six months of a new volunteer's involvement and remain available for consultation after that time.

In addition to information provided through orientation sessions and

publications, other activities can provide opportunities to pass along information about an orchestra's history and culture:

- ◆ regular meetings of trustees and other volunteer groups;
- ◆ receptions for new volunteers;
- ◆ formal or informal gatherings of volunteers and staff to work on particular projects;
- ◆ tours of the concert hall, backstage area, and administrative offices; and
- ◆ individual and small group conversations.

Whether new volunteers can be quickly and successfully integrated into the orchestra "family" often depends on how well and how quickly they come to understand the institution's culture.

Some volunteers will resist the idea of "training," perhaps because they have been involved in a similar volunteer role for another institution or because they are resistant to having someone tell them how to do their jobs. Several techniques can help overcome such resistance. First, training should be interactive, with many opportunities for feedback from those being trained. Second, when possible, experienced volunteers should do the training, in addition to or in place of staff. And third, role playing works well as a training technique, particularly when training volunteers to ask for contributions.

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Setting Expectations for Volunteers

Once volunteers are in place, there are certain expectations that the orchestra's volunteer leadership and staff can legitimately apply.

- ◆ Volunteers have the same responsibility as staff to complete whatever tasks they have agreed to do in a timely, accurate, and thorough fashion.
- ◆ Volunteers recognize that they are the orchestra's representatives in the community. They are in a unique position to advance the orchestra's interests in contacts with friends and business associates; and they are also in a position to do the orchestra harm by making negative comments about the organization and its programs or about other volunteers or staff.
- ◆ Volunteers should be well informed about the orchestra and its programs. This is, of course, a two-way street, as the ability of a

volunteer to become and to stay well informed depends on the orchestra's programs for volunteer orientation and education and on how well it communicates with the broad range of volunteers.

- ◆ Volunteers should work with staff as partners and colleagues. They should keep staff informed of the progress of their tasks; they should inform staff if something occurs which affects their willingness or ability to do the job; and they should consult with staff before departing from an agreed-upon plan.
- ◆ Effective volunteers willingly step forward to support the orchestra with their own financial resources, as well as their time. Fund-raising volunteers, in particular, cannot ask for a gift until they have made a gift themselves.

Just as importantly, there are expectations that orchestra volunteers legitimately apply to the staff and volunteer leadership.

- ◆ Volunteers want to help the orchestra. But they want some things for themselves, too, including timely information about the orchestra and its programs, direct contact with music and musicians, appropriate training for tasks in which they are engaged, and exposure to a variety of interesting and enjoyable experiences.
- ◆ Volunteers expect to have a role in institutional planning and decision making at an appropriate level. They want to work as team members with volunteer leadership and staff; they do not want to be thought of as “free help.”
- ◆ Volunteers—as a function of the volunteer/staff partnership—look to staff to keep them informed of progress on tasks in which they are jointly engaged and of any factors which affect these tasks.
- ◆ Volunteers want and deserve appreciation and recognition for the service that they provide. Orchestras could not survive, at least not as we know them, without the volunteer leadership and technical expertise, the financial support, and the countless thousands of hours of labor which volunteers provide.

“Volunteers expect to have a role in institutional planning and decision making at an appropriate level.”

And someplace in our consideration of how we obtain and utilize volunteer resources, there must be room for fun. Enjoyment of what one does is a prime motivation for volunteers and responsibility for making sure that volunteers enjoy the tasks that they agree to do rests squarely with the volunteer leadership and the staff.

Questions Answered; Questions Raised

All that said, where are we left in our understanding of the human resources which we employ in institutional marketing in the service of our orchestras? A close reading of the preceding thoughts will raise at least as many questions for the attentive reader as it will answer. Some additional questions it has caused me to ask, and perhaps attempt to answer in some future article, are as follows:

- ◆ Are there orchestras whose musicians are successfully involved in the institutional marketing process? If not, should musicians be involved, and how should we go about getting them involved?
- ◆ How should we go about “importing” good ideas in institutional marketing from other kinds of institutions, such as colleges and universities?
- ◆ How can we deal with the systemic problem of underinvestment in development? Can we establish some useful standards for development investment that can be widely applied to a variety of orchestras?
- ◆ How can we establish a development culture in each symphony orchestra organization, raising the awareness of development programs and goals among each member of the orchestra “family,” and creating a role for each family member within that culture?
- ◆ Are our volunteer groups aging at the same rate as our audiences? Assuming that we need to enlist younger volunteers, are there special approaches that we need to take to reach them? Will our volunteer structures need to be revamped to accommodate the different lifestyles of young volunteers?

It is clear that volunteers play vital roles in symphony orchestra organizations. In strong orchestral organizations, volunteers are effective partners of staff and trustee leadership, providing service across a wide range of activities. Every member of the symphony orchestra “family” needs an understanding of what treasured commodities volunteer resources are. As the Symphony Orchestra Institute works to improve the effectiveness of symphony orchestra organizations, perhaps the thoughts I have shared here will help orchestras develop policies and plans that are inclusive and that use volunteer resources wisely.

Michael Gehret is Vice President for Marketing and Development of the Chicago Symphony Orchestra. Prior to joining the Chicago Symphony Orchestra, he served for 12 years as Development Director for the San Francisco Symphony. He holds an M.A. in higher education administration from Columbia University and an A.B. from Princeton University.

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